

Final Report - White Paper

Grant Number: HAA-256175-17

Project Title: The Development of Digital Documentary Editing Platforms

Project Director: Jennifer Stertz

Co-Project Directors: Cathy Moran Hajo and Erica Cavanaugh

Grantee Institution: University of Virginia

Submission Date: 31 March 2019

Table of Contents

1. Project Summary	2
2. Project Background	2
3. Workshop One Structure	4
4. Workshop One Findings and Outcomes	6
5. Survey Findings	16
6. Workshop Two Structure	19
7. Workshop Two Findings and Outcomes	19
8. Conclusion and Next Steps	21
9. Appendices	
a. Appendix A - Workshop One Participants	23
b. Appendix B - Workshop One Schedule	25
c. Appendix C - Workshop Two Participants	30
d. Appendix D - Workshop Two Schedule	31
e. Appendix E - Cathy Moran Hajo's Presentation	33
f. Appendix F - Jennifer Stertzner's Presentation	46
g. Appendix G - Digital Edition Platform / Tools Survey	67

The Development of Digital Documentary Editing Platforms

Project Summary: This project brought together editors and technical experts currently engaged with two open-source content management systems—Omeka and Drupal—during two workshops to discuss the use, development, and distribution of digital documentary editions using those platforms. The workshops included: (1) presentations / demonstrations by projects currently using the two systems for editorial work, highlighting the strengths and weakness of each platform, the development process, editorial methodological requirements, and publication goals; (2) presentations by editors outlining specific editorial/publication needs; (3) discussions of editorial scenarios, technical considerations, and publication targets, and; (4) development of a white paper outlining the workshop’s findings and next steps.

Project Background: While tools and platforms developed by and for digital humanists have grown exponentially in the past few years, there is still no approachable, powerful platform that supports all aspects of editorial work from document collection to digital publication.

Furthermore, limited resources, including availability and affordability of technical expertise, funding for developing stand-alone platform solutions, and digital publication options limit what editors can produce. A few editorial projects have experimented with possible solutions, by customizing two readily available open-source content management systems, Omeka and Drupal. Both systems offer the potential to provide editors with stable, flexible, and powerful platforms to build engaging digital editions. In order to be a viable solution for editors, a platform must provide the major workflow components of creating a digital documentary edition—content management, editing interface, content markup and visualization, and user interface development / publication. Developing this platform requires not only content expertise but also demands

familiarity with the documents themselves: how documents are structured and formatted, how they relate to one another, how best to craft annotation and indexes that allow for intellectual accessibility, and to adapt editorial processes to the digital environment designing user interfaces for searching, browsing, and viewing the materials.

Omeka, a content management system built on the MySQL-PHP technology stack, is a free, open-source web-publishing platform. Omeka excels at managing and displaying library, museum, archives, and scholarly collections and exhibits. Omeka has been successfully used at several documentary editing projects, including The Jane Addams Papers Project (janeaddams.ramapo.edu) and the Civil War Governors of Kentucky Digital Documentary Edition (discovery.civilwargovernors.org). It is also widely used by archives and historical societies to manage image-based digital collections.

Drupal, also built on the MySQL-PHP technology stack, is a free, open-source content management system and web-publishing platform. Drupal excels at working with materials that are more complex and require specific data models, views into the data, and the ability to customize at granular levels. Two examples of a Drupal-based editorial project are the George Washington Financial Papers Project (financial.gwpapers.org) and the Writings of Charles S. Peirce Edition Project (<http://www.peirce.iupui.edu/index.html>). Drupal is widely used in a range of professions, from business to higher education.

We focused on Omeka and Drupal for several reasons. Both are (1) successfully used by editors; (2) able to create robust displays and searching, querying, and browsing functionalities; (3) accessible in terms of cost and usability; (4) implementable, extensible and maintainable without dedicated IT personnel; (4) designed to manage both the backend (content/data) and

frontend (website interface) in one system meaning editors will only need to familiarize themselves with one tool; and (5) open-source, with both the core and add-on (module and plugin) code developed and actively maintained by a large international community, ensuring continued stability, evolution, and support.¹

We hosted two workshops during the grant period. The first workshop took place at the University of Virginia, 19-20 April 2018, and included 20 participants (see Appendix A for list of participants; for the meeting agenda, see Appendix B). The second workshop took place at the University of Virginia, 5 December 2018, and included 11 participants (see Appendix C for list of participants; for the meeting agenda, see Appendix D).

Workshop One Structure: Workshop one included presentations and small-group meetings.

The presentations by the editors provided an overview of how the platforms were used at their projects:

- Cathy Moran Hajo, Editor and Director, The Jane Addams Papers Project, Ramapo College of New Jersey, presented “Designing a Digital Edition using Metadata and Omeka” (see Hajo’s presentation in Appendix E)
- Heidi Kaufman, Associate Professor, University of Oregon, presented “Staging Omeka Instruction”

¹ Other tools and platforms do exist that manage various components of the editorial and publication process. Our interest in platforms that offer a complete array of functionality, from collection to publication, narrows that list considerably. Islandora holds potential for editors; an open-source software framework, Islandora is built on a base of Drupal, Fedora, and Solr. One benefit of this system is that it brings together the content management and presentation capabilities of Drupal with the long term preservation features of Fedora. There are several “solution packs” available enabling content-specific customizations, such as newspaper, audio, and video, though nothing that deals with exclusively with documents. But Islandora requires the editor/developer to update and maintain several different programs. Installation, maintenance, development, and changes can prove difficult for editors/developers, requiring knowledge of how Fedora, Solr, and Drupal work together.

- Whitney Smith, Assistant Editor, Civil War Governors of Kentucky Digital Documentary Edition, Kentucky Historical Society, presented “Omeka and the Civil War Governors: The Limit Does Not Exist”
- Christy Regenhardt, Editor, The Eleanor Roosevelt Papers, The George Washington University, presented “Struggling with a University Instance of Drupal”
- Mark Cheatham, Project Director and Co-Editor, The Papers of Martin Van Buren, Cumberland University, presented “The Papers of Martin Van Buren in Drupal”
- Jennifer Stertz, Director, Center for Digital Editing, University of Virginia, presented “The George Washington Financial Papers Project: Edition and Platform” (see Stertz’s presentation in Appendix F)
- Quinn Dombrowski, Digital Humanities Coordinator, University of California - Berkeley, Data Architect, Agile Humanities Agency, presented “Using Drupal for DH/DE Projects”
- Victoria Sciancalepore, Assistant Editor, The Jane Addams Papers Project, Ramapo College of New Jersey, presented “Administering a Digital Edition with Omeka”
- Ben Bakelaar, Digital Architect, Thomas A. Edison Papers, Rutgers University, and Paul Israel, Director and General Editor, Thomas A. Edison Papers, Rutgers University, presented “Moving the Edison Papers into the 21st Century”

These project-focused presentations were followed by presentations by designers, developers, and publishers:

- Erica Cavanaugh, Project Developer, Center for Digital Editing, presented “Making the Case for Drupal”

- Anneliese Dehner, Independent Digital Library Developer, presented “Adapting Omeka for Digital Editions”
- Patrick John-Murray, Research Assistant Professor, Roy Rosenzweig Center for History and New Media, George Mason University, presented “Omeka Content Creation and Publication Workflows”
- John Flatness, Senior Software Developer, Roy Rosenzweig Center for History and New Media, George Mason University, presented “Scripto with Omeka S”
- Bill Kennedy, Designer, Agile Humanities Agency, presented “Bringing a Design Process to the Digital Humanities”
- David Sewell, Editorial and Technical Manager, Rotunda, Manager of Digital Initiatives, University of Virginia Press, presented “A Rationale for using TEI-XML in digital documentary edition workflows”

The small group work focused on several key topics: workflow and administration; specifications and methodology; user experience; and, data infrastructure. After the small groups had a chance to meet, all reported back to the larger group for discussion.

Workshop One Findings and Outcomes: Below is an outline of the topics and questions considered by each small group, along with the conclusions that were agreed to and summarized by the larger group.

Workflow and Administration:

- What do you need to track in order to administer a digital edition?
- How important is it to be able to track workflow within your platform?
- What kinds of reports and information do you need to be able to get from your edition?

Conclusions: The group concluded that tracking workflow within a platform is ideal while also acknowledging that no perfect solution will be possible. However, there are common elements

projects share which could be incorporated into a system, including version control, ability to create reports (ie. status of work, quantifying of document states), and capturing workflow steps (digitized image created, document transcribed, document proofread, etc.). Additionally, centralizing project workflow and administration within one system makes it easier for projects whose staff are geographically dispersed.



Specifications and Methodology:

- How do you define a document or item in your digital edition? The smallest thing that you will gather metadata on?
- Do you plan to use images, transcriptions, or both?
- What do you want your transcriptions to be able to do?
- How complex is your editorial methodology?
- What different kinds of “documents” do you have? How similar or different are they?

Conclusions: The group determined that granularity expands capability so the system needs to be able to accommodate a variety of “documents” including materials that are not text-based, such as images, audio files, etc. The expectation is that many projects will want to include not only transcriptions but also images of documents. In some cases, providing document images allows an editor flexibility in transcription policy; for example, in the case of finrail documents, providing the image might make complex formatting of the transcription unnecessary. On the

other end of the spectrum, some projects might want to represent document formatting as much as possible. This is one area where the platforms struggle; future work will need to be done to figure out whether something like XML can be integrated into the platforms.

In order for a system to be usable for a variety of projects, there needs to be a baseline methodology for editions in place. This will require projects to give up a certain degree of specificity, but for some projects the benefits will outweigh the disadvantages.



User Experience:

- Who is your main audience, and what do they want to do with the edition?
- Is there a secondary audience with different needs that you want to support?
- How will users be able to search, browse, and visualize the contents of your edition?
- Do you plan on allowing them to interact with the edition?
 - Crowdsourcing, exporting data, text analysis, or creating own editions?

Conclusions: The group concluded that the audience for digital documentary editions has grown exponentially in the past decade. Consequently, projects need to be increasingly public-facing and we must plan and build digital editions for a large, diverse audience. What

does that mean for our work and for the tools we decide to use? Both Omeka and Drupal provide editors with a number of options for discoverability, display of content, integration of search/browse features as well as control over when and what is “published.” Projects can decide to publish rough transcriptions, document catalogs, or other materials long before the digital edition is complete. Additionally, the group identified other ideal materials: visualizations (such as text and network analysis), lesson plans, exhibits, data exports.



Data Infrastructure:

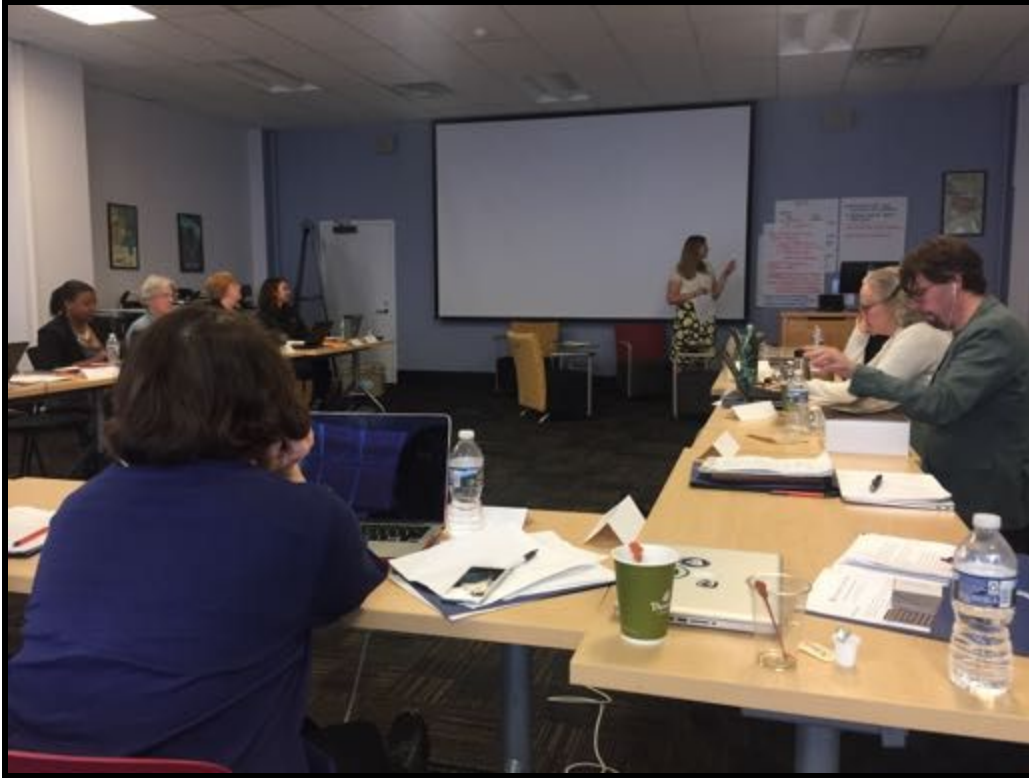
- What types of metadata do you need to track on all documents?
- Do you need to encode metadata or use database fields? Why?
- Are there relationships between items that you need to track?
- Will you use a standard metadata or encoding scheme?
- How will you make your documents searchable?

Conclusions:

1. Types of metadata:
 - a. Common to all projects

- b. Unique metadata - sequencing
 - c. Unique IDs (library land) DOI
 - d. Repository / collection
 - e. Document
 - f. Administrative / workflow
 - g. File metadata
 - h. Encoding metadata depends on project goals and granularity
 - i. Types of metadata are guided by audience: users, project editors/internal
2. Encode / database fields:
- a. Need to encode or use database fields, both are doable, system determines
 - b. Projects have different needs
 - c. Some HTML encoding in db transcriptions
3. Relationships:
- a. Document-to-document - narrative
 - b. Document to people
 - c. People to people
 - d. Document to repository
 - e. Item to item
 - f. Entities to entities
4. Standard or encoding scheme, yes - variations on a theme
5. Making docs searchable:
- a. Reading order
 - b. Narrative
 - c. Sitemap
 - d. Full text - fuzzy search
 - e. Google search - analytics
 - f. Faceted search - categories/time based; stemming/operators
 - g. Packaged collections
 - h. Can searches

- i. References-indexes on subjects
- j. Maps
- k. Exhibits



With these group findings in hand, we identified next steps:

1. Build and conduct a survey.
2. Participate in the poster session of the Association for Documentary Editing's (ADE) annual meeting, providing an overview of the workshop along with information about the two platforms.
3. Host another workshop to discuss survey results and next steps.

The survey (see Appendix G) was distributed to the following outlets: SEDIT-L, humanist @dhhumanist.org, H-Public, H-Digital History, DHSI, the ADE website, and on various social media outlets (Facebook, Twitter). We received 29 responses. Members of the group also

presented at the ADE's annual meeting. One poster focused on Drupal (see image 1) while the other focused on Omeka (see image 2). Participants were also given a handout outlining the group's goals (see image 3).

DRUPAL FOR EDITORS



WHAT IS DRUPAL?

A highly customizable, open-source platform for organizing, visualizing, analyzing, editing, managing, and publishing content.

How it Works

The three main components are:

- content types - templates for storing different kinds of data
- taxonomies - associates categories, tags, or similar data with your content
- views - default and user-generated displays of content

Using Drupal for Editing

- Catalog and create metadata for documents
- Relate document records with: [repository and collection information] [people/place IDs]
- Develop and manage editorial workflows + track versions
- Transcribe into custom, semantic fields
- Create document-specific annotation
- Create taxonomies and indexes
- Build content views: [browse by date, topic, person, place, etc.] [transcription + manuscript image] [list related documents, people, and places]
- Imbed interactive maps and timelines
- Publish documents

THANKS



Center for Digital Editing
University of Virginia

centerfordigitalediting.org



Image 1 - Drupal poster.

The Development of Digital Documentary Editing Platforms

NEH Digital Humanities Advancement Grant, Level 1

→ This project brought together editors and technical experts engaged with two open-source content management systems—Omeka and Drupal—during a two-day workshop held in April 2018 at the University of Virginia to discuss the use, development, and distribution of options for creating and publishing digital documentary editions.

Workshop Goals:

1. Explore how Omeka and Drupal are being used by projects & the editorial and publication needs that drove each project's development;
2. Hear from projects that are considering digital publication and/or technical solutions & review requirements and compile list of must have features/functionalities;
3. Develop a list of specifications & discuss how to collaborate on future development and distribution of two platform options, and;
4. Create a white paper outlining presentations, discussions, and next steps.

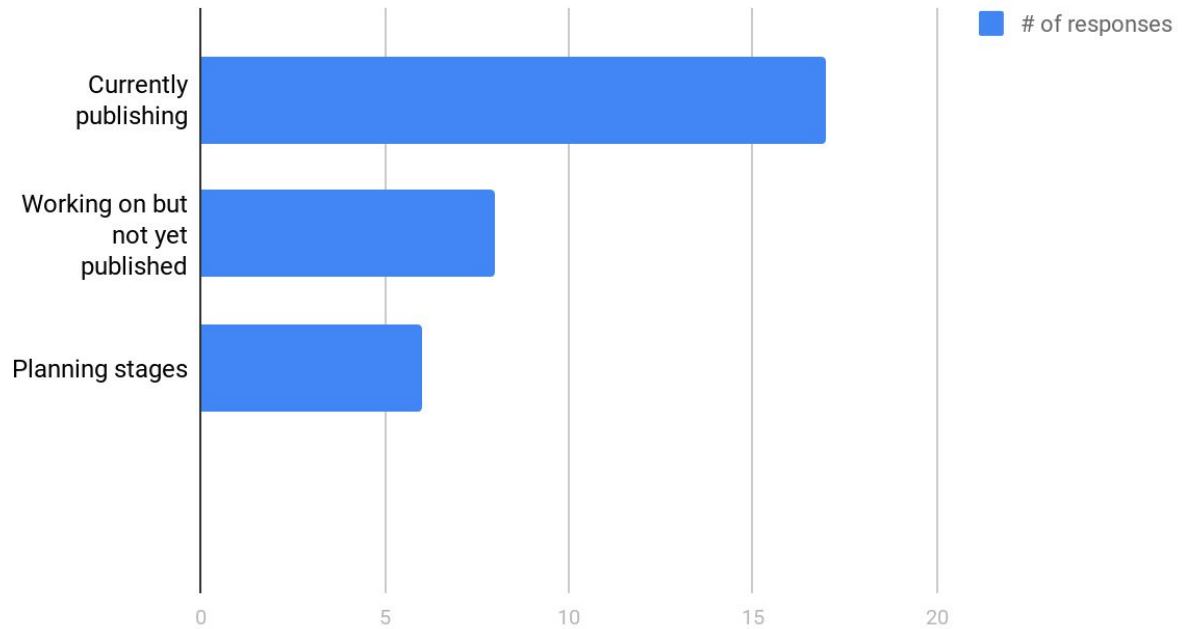
Want more information? Interested in the outcomes and next steps?

Contact Jennifer Stertzner at jes7z@virginia.edu or visit centerfordigitalediting.org.

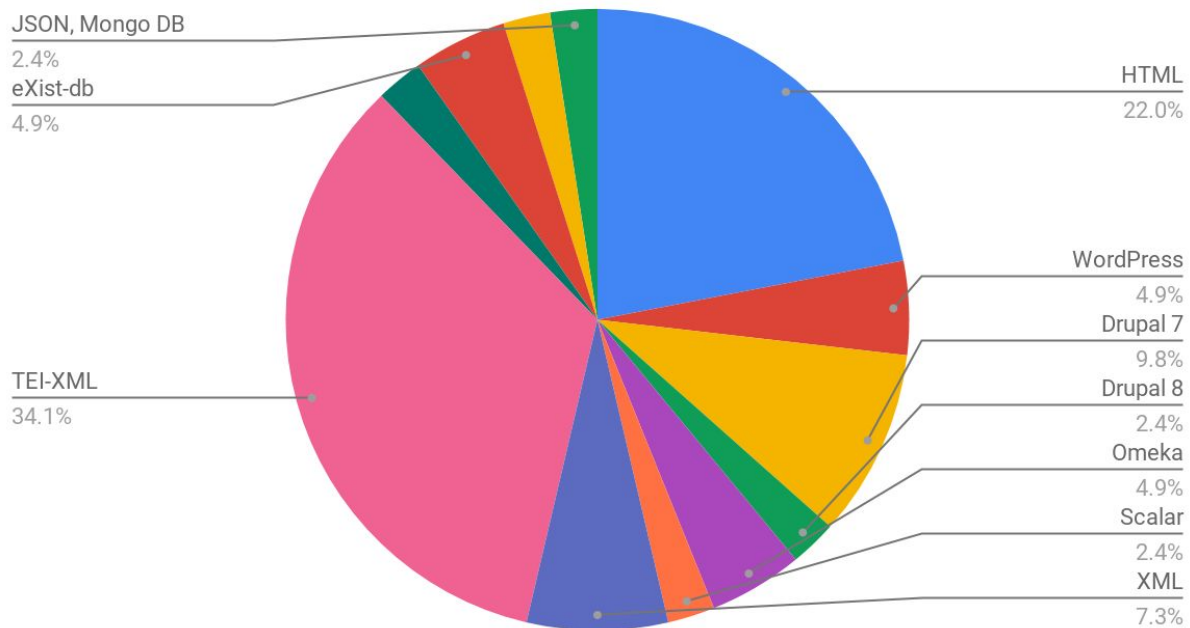
Image 3 - ADE handout.

Survey Findings:

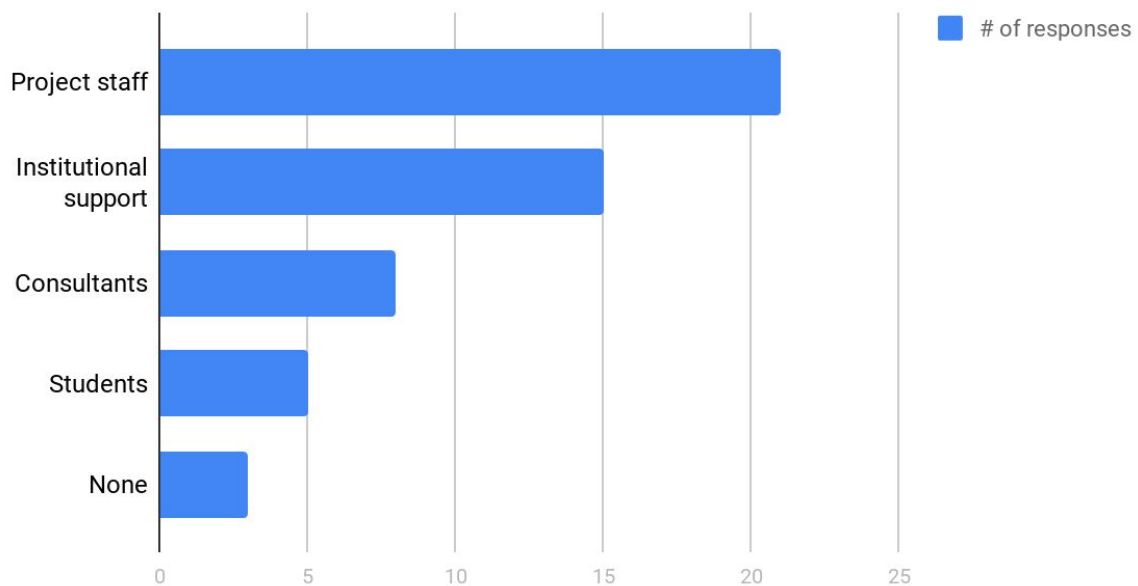
What best describes your digital edition work and/or plans?



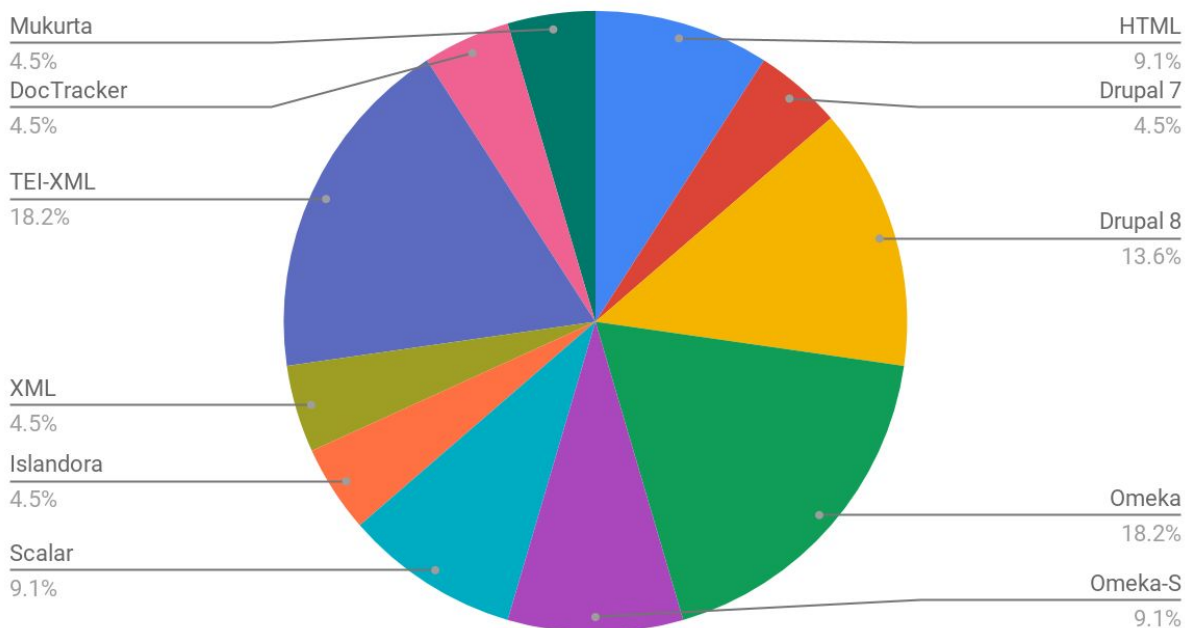
Current platform/tool for publication:



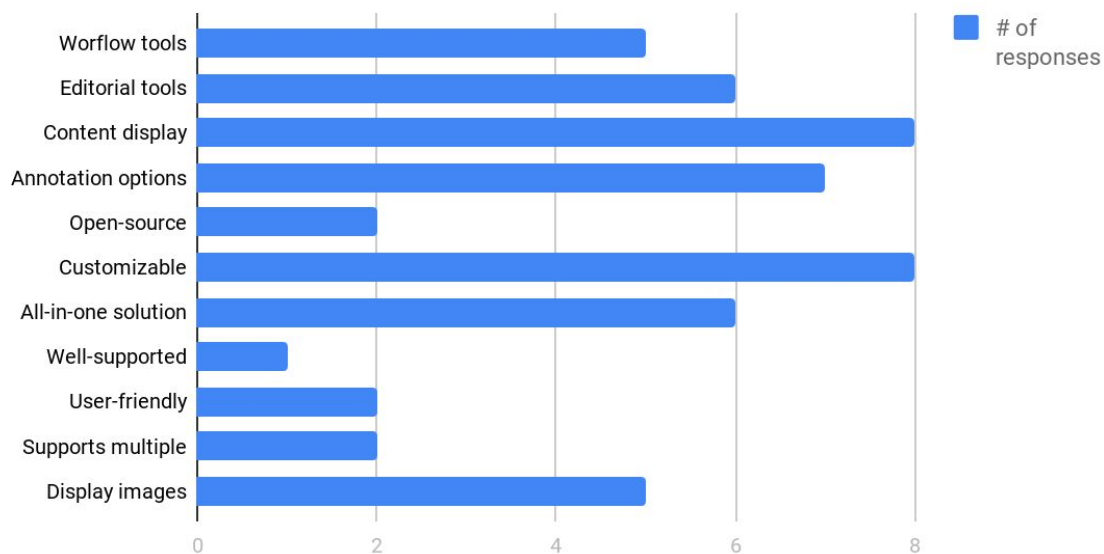
Who currently provides the digital expertise for your online publications?



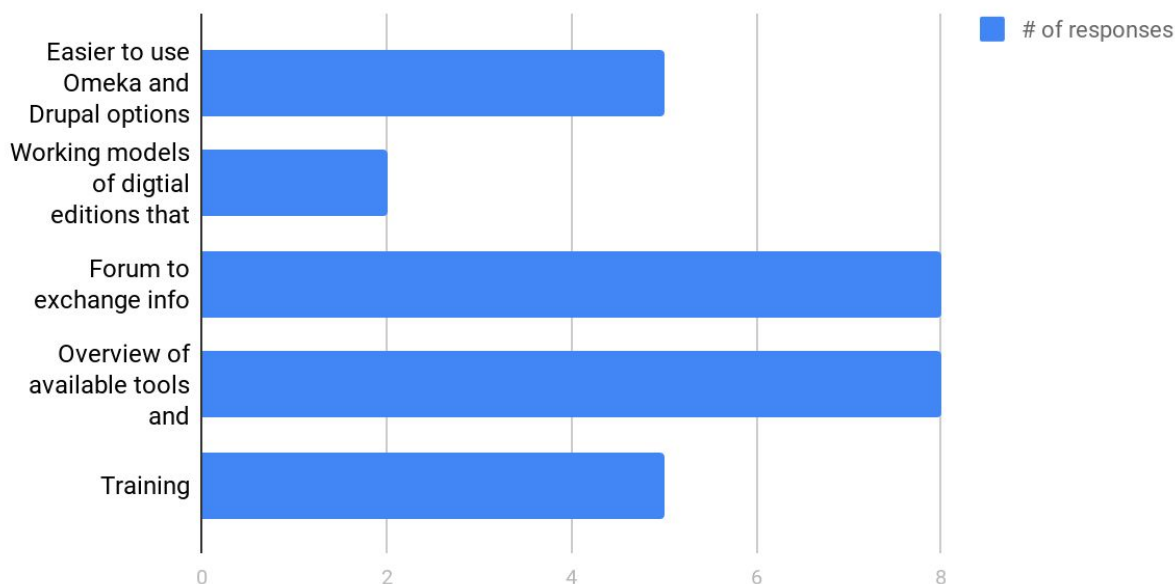
What tools and platforms are you interested in using?



What features are you looking for in a digital edition publication platform (editorial tools, content display, workflow tools, annotation options, etc.)?



What kinds of tools, workshops, or instructional materials would help you most to publish the digital edition you want?



Workshop Two Structure: Workshop two included a review of the December meeting and outcomes, updates from the group (ADE poster session response, NHPRC/Mellon Digital Publishing Cooperatives update), and a presentation by the Eleanor Roosevelt Papers Project regarding their efforts to create a module for displaying TEI documents in Drupal 8. The group also discussed the survey results, what the group can provide to the larger community moving forward, and what role the ADE might play. See Appendix C for list of participants; for the meeting agenda, see Appendix D.

Workshop Two Findings and Outcomes: During this workshop, the group also broke up into small groups to discuss the survey results. Based on the December workshop discussion outcomes and the results from the survey, the group reached several conclusions:

1. We envision the audience for this project's eventual next steps to be editors that want to use one system for everything.
2. Important features the platforms should contain include:
 - a. Easy to use
 - b. Sustainable
 - c. Interoperable
 - d. Have the ability to integrate non-textual materials
 - e. Include a baseline set of docs/items/basic metadata
 - f. Customizable with add-ons, such as workflow, annotation, subject taxonomies, administrative tools, maps, and timelines
 - g. Include canned, but customizable, themes and views, and ways to publish
 - h. Allow for accessibility - images with text, color choices, drop downs
 - i. Conform to standards; core distributions might share basic metadata but also offer ability to add or customize
 - j. Support/accommodate native TEI-XML
3. Building and sustaining community is necessary; ideas:
 - a. Desire for workshops hosted by ADE focusing on platform uses and conducting an environmental scan
 - b. Creation of clear, specific, and detailed documentation about the tool created by this group and others
 - c. Increase educational resources

- d. Need online forum that is accessible and maintained in one place (ie. we need more than an annual meeting and an email listserv) with pre-populated questions and opportunities for new threads.
- e. Flow chart or questionnaire that guides editors through what they need to know as they conceptualize (sharing best practices); along the same lines as the questionnaire the CDE developed
- f. Ability to share your decision making process and how you came to build edition, this would be good to peer review. It's helpful to document process

Conclusion & Next Steps: This project's goal was to bring together editors and technologists to discuss the application of Omeka and Drupal in digital documentary editing projects, to consider how the groups experiences and expertise might be leveraged in building solutions for the community, and to discuss other ways this group might facilitate further conversation and community-building. The workshops served these purposes well, and the survey and poster session outreach provided outside perspective. The main findings of the group can be summarized in three conclusions:

1. Both Omeka and Drupal are capable of providing editors with stable, flexible, and powerful platforms to build engaging digital editions.
2. In order to accommodate a project's editorial needs and publishing goals, any platform distribution would need to include both standardized and customizable features.
3. There is a strong desire for community in the field, which could take the form of areas for information exchange, how-to documentation and examples, as well as training and access to information about available tools and technologies that support this work.

Possible next steps center around these conclusions but will also need to take into account the recent advances in the field. By far the most influential of these is the NHPRC/Mellon's grant program - Digital Edition Publishing Cooperatives - which has advanced from the planning stage to accepting applications for implementation. Outlets for publishing digital documentary editions have been very limited in the past and have motivated editors to seek all-in-one solutions, such as those offered by Omeka and Drupal. The outcomes of the NHPRC/Mellon's initiative will impact next steps for this group, though we envision the results will complement our work and provide a number of options for editors.

Appendix A - Workshop One Participants

The Development of Digital Documentary Editing Platforms
NEH Digital Humanities Advancement Grant, Level 1
The University of Virginia
19-20 April 2018, Charlottesville, Virginia
Workshop Participants

Tenisha Armstrong, Associate Director, The Martin Luther King, Jr. Research and Education Institute, Stanford University, tenisha@stanford.edu

Ben Bakelaar, Digital Architect, Thomas A. Edison Papers, Rutgers University, bakelaar@rutgers.edu

Katie Blizzard, Communications Specialist, The Washington Papers, Research Editor, Center for Digital Editing, University of Virginia, kal3aw@virginia.edu

Erica Cavanaugh, Research Editor, The Washington Papers, Project Developer, Center for Digital Editing, University of Virginia, efc8d@virginia.edu

Mark Cheatham, Project Director and Co-Editor, The Papers of Martin Van Buren, Cumberland University, mcheatham@cumberland.edu

Anneliese Dehner, Independent Digital Library Developer, dehner.a@gmail.com

Quinn Dombrowski, Digital Humanities Coordinator, University of California - Berkeley, Data Architect, Agile Humanities Agency, quinn.anya@gmail.com

John Flatness, Senior Software Developer, Roy Rosenzweig Center for History and New Media, George Mason University, john@zerocrates.org

Silvia Glick, Associate Director and Managing Editor, The Howard Thurman Papers Project, Boston University School of Theology, silviaglick@gmail.com

Cathy Moran Hajo, Editor & Director, The Jane Addams Papers Project, Ramapo College of New Jersey, chajo@ramapo.edu

Paul Israel, Director and General Editor, Thomas A. Edison Papers, Rutgers University, pisrael@rutgers.edu

Heidi Kaufman, Associate Professor, University of Oregon, hkaufman@uoregon.edu

Bill Kennedy, Designer, Agile Humanities Agency, bill@stop14.ca

Patrick Murray-John, Research Assistant Professor, Roy Rosenzweig Center for History and New Media, George Mason University, patrickmjchnm@gmail.com

Sue Perdue, Director of Digital Strategy, Virginia Foundation for the Humanities, ssh8a@virginia.edu

Christy Regenhardt, Editor, The Eleanor Roosevelt Papers, The George Washington University, regenha@gwu.edu

Victoria Sciancalepore, Assistant Editor, The Jane Addams Papers Project, Ramapo College of New Jersey, vscianca@ramapo.edu

David Sewell, Editorial and Technical Manager, Rotunda, Manager of Digital Initiatives, University of Virginia Press, dsewell@virginia.edu

Whitney Smith, Assistant Editor, Civil War Governors of Kentucky Digital Documentary Edition, Kentucky Historical Society, Whitney.Smith@ky.gov

Jennifer Stertz, Senior Editor, The Washington Papers, Director, Center for Digital Editing, University of Virginia, jes7z@virginia.edu

Appendix B - Workshop One Schedule

The Development of Digital Documentary Editing Platforms
NEH Digital Humanities Advancement Grant, Level 1
The University of Virginia
19-20 April 2018, Charlottesville, Virginia
Workshop Schedule

Thursday, 19 April 2018

Alderman Library, Room 421

Morning

9:00: Coffee and Conversation

9:15: Workshop and Participant Introduction

9:30-12:15: Demonstrations from projects currently using Omeka and Drupal

Presenters:

1. Cathy Moran Hajo (9:30-9:45)
 - a. **Designing a Digital Edition using Metadata and Omeka**
2. Heidi Kaufman (9:45-10:00)
 - a. **Staging Omeka Instruction**
3. Whitney Smith (10:00-10:15)
 - a. **Omeka and Civil War Governors: The Limit Does Not Exist**
4. Christy Regenhardt (10:15-10:30)
 - a. **Struggling with a University Instance of Drupal**
5. Mark Cheatham (10:30-10:45)
 - a. **The Papers of Martin Van Buren in Drupal**
6. Jennifer Stertz (10:45-11:00)
 - a. **The George Washington Financial Papers Project: Edition and Platform**
7. Quinn Dombrowski (11:00-11:15, Skype)
 - a. **Using Drupal for DH/DE Projects**

11:15-11:30: Break

8. Victoria Sciancalepore (11:30-11:45)

a. **Administering a Digital Edition with Omeka**

9. Paul Israel & Ben Bakelaar (12:00-12:15)

a. **Moving the Edison Papers into the 21st Century**

12:15-12:30: Questions and comments

Afternoon

12:30-1:15: Lunch and Conversation

1:15-3:15: Small focus group meetings; reporting back to larger group.

Key topics:

Workflow and Administration (1:15-1:45)

- What do you need to track in order to administer a digital edition?
- How do the training and experience of the staff help determine platform use?
- How important is it to be able to track workflow within your platform?
- What kinds of reports and information do you need to be able to get from your edition?

1:45-2:15: Large group conversation.

Specifications and Methodology (2:15-2:45)

- How do you define a document or item in your digital edition? The smallest thing that you will gather metadata on?
- Do you plan to use images, transcriptions, or both?
- What do you want your transcriptions to be able to do?
- How complex is your editorial methodology?
- What different kinds of “documents” do you have? How similar or different are they?

2:45-3:15: Large group conversation.

3:15-3:30: Break

3:30-5:30: Small focus group meetings; reporting back to larger group.

Key Topics:

User Experience (3:30-4:00)

- Who is your main audience, and what do they want to do with the edition?
- Is there a secondary audience with different needs that you want to support?
- How will users be able to search, browse, and visualize the contents of your edition?
- Do you plan on allowing them to interact with the edition?
 - Crowdsourcing, exporting data, text analysis, or creating own editions?

4:00-4:30: Large group conversation.

Data Infrastructure (4:30-5:00)

- What types of metadata do you need to track on all documents?
- Do you need to encode metadata or use database fields? Why?
- Are there relationships between items that you need to track?
- Will you use a standard metadata or encoding scheme?
- How will you make your documents searchable?

5:00-5:30: Large group conversation.

6:00: Dinner and conversation at Orzo (<http://orzokitchen.com>).

Friday, 20 April 2018

Alderman Library, Room 421

Morning

9:00: Coffee and Conversation

9:15: Demonstrations/presentations from Drupal and Omeka Developers

Presenters:

1. Erica Cavanaugh (9:15-9:30)
 - a. **Making the Case for Drupal**

2. Anneliese Dehner (9:30-9:45)

a. Adapting Omeka for Digital Editions

3. Patrick Murray-John (9:45-10:00)

a. Omeka Content Creation and Publication Workflows

4. John Flatness (10:00-10:15)

a. Scripto With Omeka S.

5. Bill Kennedy (10:15-10:30)

a. Bringing a Design Process to the Digital Humanities

6. David Sewell (10:30-10:45)

a. A Rationale for using TEI-XML in digital documentary edition workflows

10:45-11:00: Break

11:00-12:30: Small focus group meetings; reporting back to larger group.

Key topics:

Platform Specifications (11:00-11:30)

- What content types, workflows, and editorial methodologies need to be available in the platforms?
- User interfaces and navigation.
- Hosting and digital publication.

11:30-12:30: Large group conversation.

Afternoon

12:30-1:15: Lunch and Conversation

1:15-2:25: Small focus group meetings; reporting back to larger group.

Narrowing the Focus (1:15-2:00)

Key topics:

- What are the priorities for moving forward? Review outcomes from previous small/large group discussions and prioritize: workflow and administration,

specifications and methodology, user experience, data infrastructure, platform specifications.

2:00-2:45: Large group conversation.

2:45-3:15: Break (30 minutes to explore the Grounds)

3:15-5:30: Next Steps

- Additional time for comments/questions about demonstrations and presentations.
- White paper and what it should include.
- Should we move forward with development and distribution? How can we collaborate?
- Plan for distributing information and white paper generated at the workshop.

6:00: Dinner and conversation at Maya (<http://www.maya-restaurant.com>).



This project is supported by the National Endowment for the Humanities and hosted by the Center for Digital Editing at the University of Virginia and The Jane Addams Papers Project at Ramapo College of New Jersey.

This workshop, the Development of Digital Documentary Editing Platforms, has been made possible in part by the National Endowment for the Humanities: Exploring the human endeavor. Any views, findings, conclusions, or recommendations expressed in this workshop do not necessarily represent

those of the National Endowment for the Humanities.

Appendix C - Workshop Two Participants

The Development of Digital Documentary Editing Platforms
NEH Digital Humanities Advancement Grant, Level 1
The University of Virginia
5 December 2018, Charlottesville, Virginia
Workshop Participants

Chris Alahambra, Visiting Scholar at The Eleanor Roosevelt Papers Project, George Washington University

Jessica Bandel, Editor, Office of Archives and History, North Carolina Department of Natural and Cultural Resources

Joseph Beatty, Editor, Office of Archives and History, North Carolina Department of Natural and Cultural Resources

Katie Blizzard, Research Editor, Center for Digital Editing, University of Virginia

Erica Cavanaugh, Project Developer, Center for Digital Editing, University of Virginia

Anneliese Dehner, Independent Digital Library Developer, dehner.a@gmail.com

Cathy Moran Hajo, Editor & Director, The Jane Addams Papers Project, Ramapo College of New Jersey

Christy Regenhardt, Editor, The Eleanor Roosevelt Papers, The George Washington University

Patricia Searl, Editorial and Technical Specialist, Rotunda, University of Virginia Press

David Sewell, Editorial and Technical Manager, Rotunda, Manager of Digital Initiatives, University of Virginia Press

Jennifer Stertz, Director, Center for Digital Editing, University of Virginia

Appendix D - Workshop Two Schedule

The Development of Digital Documentary Editing Platforms

NEH Digital Humanities Advancement Grant, Level 1

The University of Virginia

5 December 2018, Charlottesville, Virginia

Meeting Schedule

9am—Welcome, introductions, and coffee

9:30am—Overview of April meeting

10:00am—Updates from the group:

- Are there any developments from the group since the last meeting? Any new questions / ideas that were generated from the April discussion?
- ADE poster presentation - The Development of Digital Documentary Editing Platforms
- UVA Digital Publishing Cooperative - planning year issues, outcomes, and next steps. Where is there overlap? What are the differences?
- Eleanor Roosevelt Papers Project: Efforts to create a module for displaying TEI documents in Drupal, version 8.0+

12pm—Lunch

1–5pm—Discussion / next steps:

- Review survey results.
 - What can this group provide and what should the focus be?
 - Develop custom Omeka and Drupal distributions? Ability to scale down or up as appropriate?
 - Build and sustain community?
 - Recommend / implement standards? What are the options?
 - What role can/should the ADE play?
 - Standards
 - Digital edition best practices
 - Peer review
 - “Edition” reviews
 - What would be a good model for providing people with help in setting up digital editions using Omeka and Drupal?
 - Are we interested in helping XML-based editions, or are we really only interested in fostering the creation of database-driven ones?
 - What we are reporting to NEH?
 - What we would like to follow up with for additional funding?
-



This project is supported by the National Endowment for the Humanities and hosted by the Center for Digital Editing at the University of Virginia and The Jane Addams Papers Project at Ramapo College of New Jersey.

This workshop, the Development of Digital Documentary Editing Platforms, has been made possible in part by the National Endowment for the Humanities: Exploring the human endeavor. Any views, findings, conclusions, or recommendations expressed in this workshop do not necessarily represent those of the National Endowment for the Humanities.

Designing a Digital Edition using Metadata and Omeka

Cathy Moran Hajo, Jane Addams Papers Project
Ramapo College of New Jersey

Edition Design

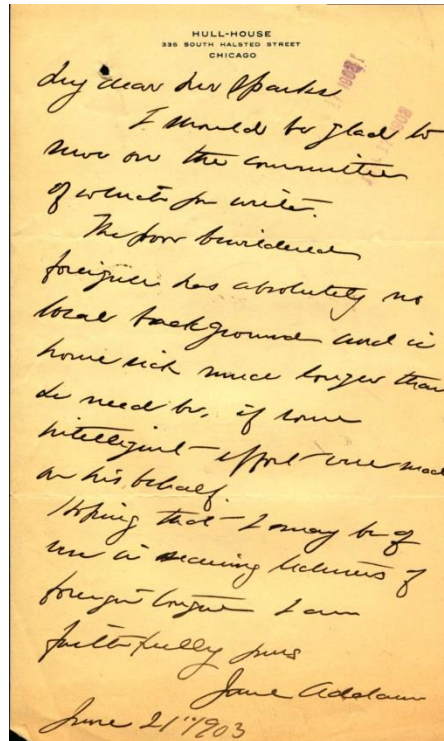
Transcriptions

Translations

Relations between docs

Search and browse by date,
subject, type, author, etc.

Archival Collections



People, Organizations, Events

Map-based views

Packaged exhibits

Public engagement, via
crowdsourcing

Teaching materials

We want it all!

Choosing a Platform

- How easy is it to use for data input?
 - Editors, student workers, possibly volunteers, teachers.
- How easy is it to use for quality control?
 - Proofreading encoded content is difficult.
- How easy is it to publish to the web?
 - Can we pick and choose which documents to publish easily?
 - Do we have to rely on programmers ?
- Is it open-source?
 - We want any development work we do to be accessible to all.
 - Is there a possibility of building shared editions using a common description format?
- Can it be migrated?
 - My experience with TEI-based digital editions was not good.



Using Metadata

- Metadata is less precise than encoding.
 - Encoding every mention of a personal name in the letter gets you to the exact spot it appears.
 - Using Omeka Item Relations indicates that a specific person was mentioned in the letter.

That silly man
<name
ref="http://www.example.com/person
ography.xml#DPB1"
type="person">David Paul
Brown</name> has suffered

Item Relations

Here you can relate this item to another item and delete existing relations. For descriptions of the relations, see the [Browse Vocabularies](#) page. Invalid item IDs will be ignored.

Subject	Relation	Object	Delete
Custom			
This Item	Written by ▾	Johnson, Clara Sturges (?-?)	<input type="checkbox"/>
This Item	Received by ▾	Addams, Jane (1860-1935)	<input type="checkbox"/>
This Item	Mentions ▾	Wilhelm II of Germany (1859-1941)	<input type="checkbox"/>
This Item	Mentions ▾	Wilson, Woodrow (1856-1924)	<input type="checkbox"/>
A Soldier's Testament	Enclosed in	This Item	<input type="checkbox"/>

Consider Your Transcription Goals

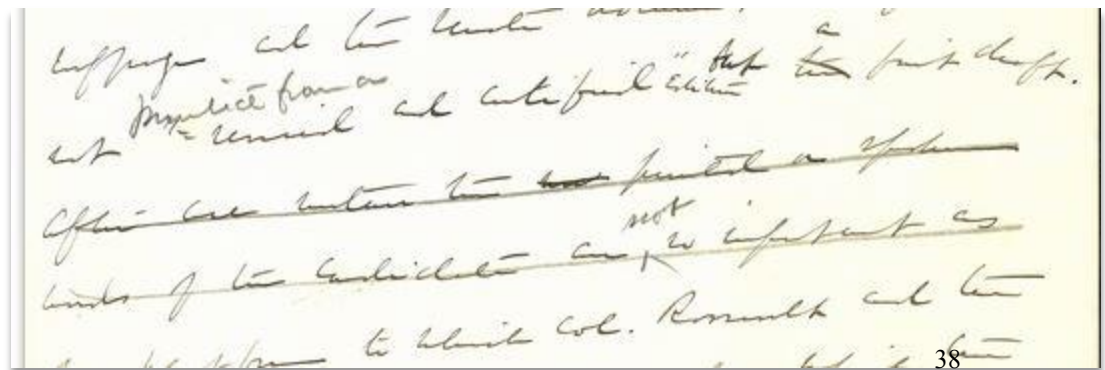
- If you want to do fancy, complex transcriptions, database-driven editions are probably not for you.
 - Mouse-over alternate readings
 - Encoding marginalia and changes of hand
 - Marking up individual characters or parts of speech for later text analysis

```
<p>Lastly, That, upon his solemn oath to  
observe all the above  
articles, the said man-mountain shall have a  
daily allowance of  
meat and drink sufficient for the support of  
<choice>  
  <sic>1724</sic>  
  <corr>1728</corr>  
</choice> of our subjects,  
with free access to our royal person, and  
other marks of our  
<choice>  
  <orig>favour</orig>  
  <reg>favor</reg>  
</choice>.</p>
```

Simpler Transcriptions

- But if the level of complexity that we have traditionally employed in print is good enough. . .
 - Using visual clues with typography -- strikeout, brackets, inserts, etc. These are HTML only, not encoded.
 - Combined with image of original, can we accept simpler transcriptions?
 - What do we lose?

newspapers that the sentence should be [omitted]
<eliminated.>. His spoken address was most
unequivocally in favor of woman's suffrage and the
Senate document therefore was not <printed from
a> "revised and certified" <edition> but the <a> first
draft. After all mention his not printed or spoken
words of the candidate are <not> be so important as
the platform to which Col. Roosevelt and the new
party was pledged and upon which the campaign
must be made. <Mrs. Harper admits was most
satisfactory in its advocacy of equal suffrage [page 2]



Handwritten manuscript snippet showing the original text with some corrections and a signature. The text is written in cursive and includes the words "draft", "first", "not", "important", "platform", "pledged", "campaign", "must", "made", "admits", "advocacy", "equal", "suffrage".

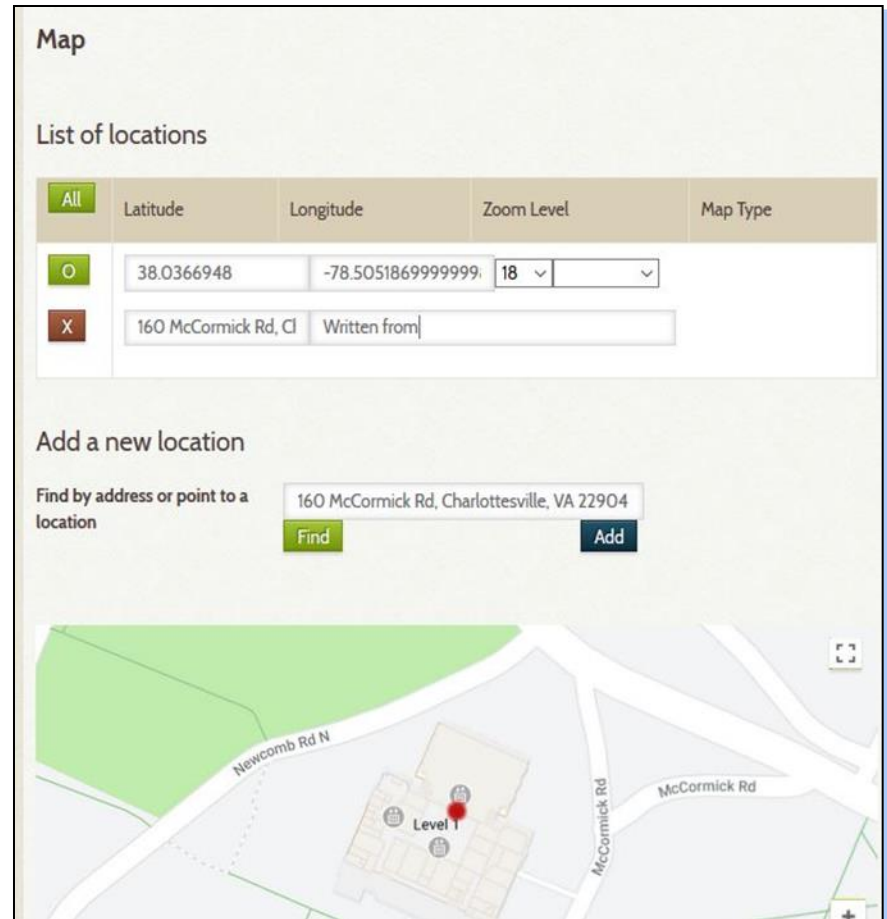
Using Omeka for a Digital Edition

- Captures all the metadata we wanted.
- Extremely easy for students and staff to work in.
 - Dublin Core metadata standard
 - Entry forms are clear and easy to use.
 - HTML options for styling text allow typography to carry meaning.
 - Free to use (server required), though customization requires consultants.

The screenshot shows the Omeka 'Edit Item' interface for item #62, 'Mary Dorsey A...'. The top navigation bar includes 'Jane Addams Digital Edition', 'Plugins', 'Appearance', 'Users', 'Settings', and a welcome message for 'Cathy Moran Hajo'. A left sidebar contains a menu with options like 'Dashboard', 'Items', 'Collections', 'Item Types', 'Tags', 'Exhibits', 'Simple Pages', 'Collection Tree', 'Item Relations', 'Redact Elements', 'Bulk Editor', 'Simple Vocab', 'History Logs', 'Curator Monitor', 'Scripto', and 'Derivative Images'. The main content area is titled 'Edit Item #62: "Mary Dorsey A..."' and features a search bar. Below the title, there are tabs for 'Dublin Core', 'Item Type Metadata', 'Monitor', 'Scripto', 'Files', 'Zoom', and 'Tags'. The 'Dublin Core' tab is active, showing a form for editing Dublin Core metadata. The form includes a description of the Dublin Core standard, a 'Title' field with a value of 'Mary Dorsey Anderson Hill to Jane Addams, January 23, 1901', and a 'Collection' dropdown menu set to 'JAP-PSC-P - Jane Addi'. Action buttons for 'Save Changes', 'View Public Page', and 'Delete' are visible on the right side of the form.

Using Omeka for a Digital Edition

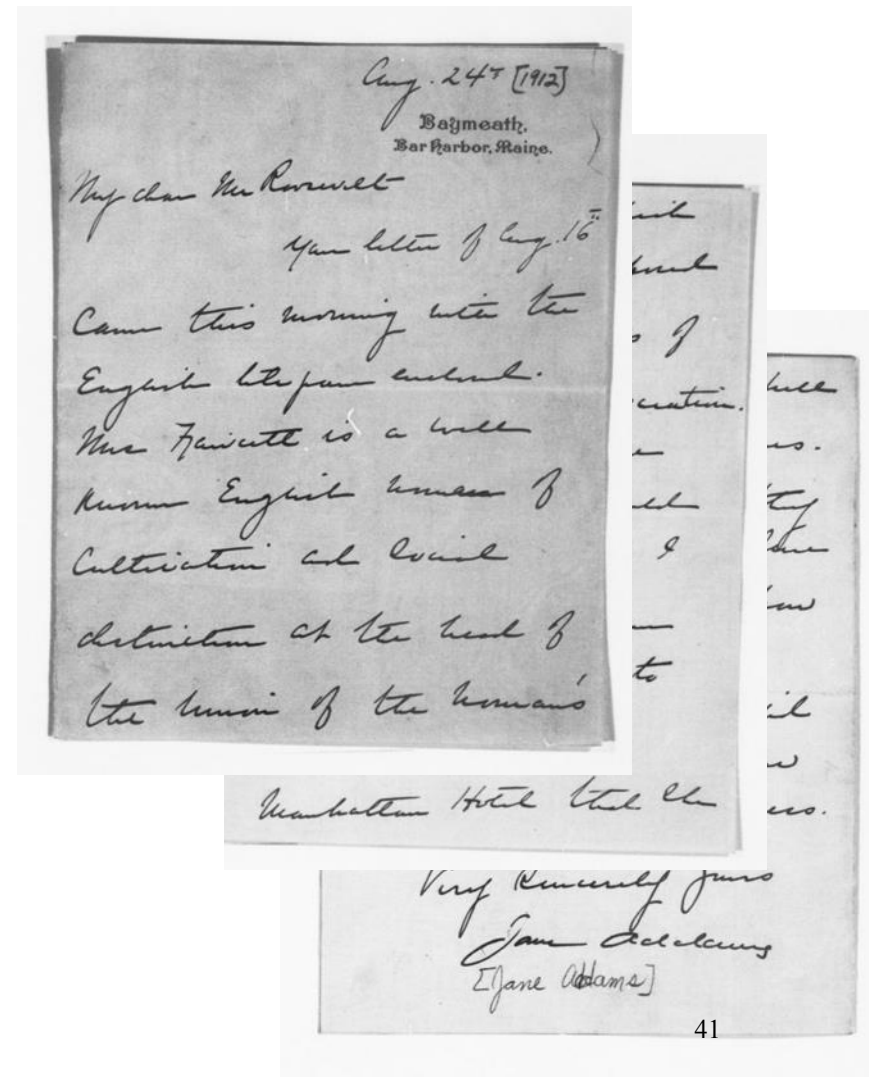
- Modules work together seamlessly.
- Adds complex functionality, like maps, by simply entering addresses.
- Item relationships allows us to build a complex web of people, documents, organizations and events.



Designing Document Metadata

■ What's important?

- Author/Recipient
- Dates
- Titles
- Types of documents
- Repositories
- Locations
- Subjects and tags
- Names mentioned
- Organizations mentioned
- Places mentioned
- Events mentioned
- Relating documents to drafts and enclosures



Designing Identification Metadata

- What's important for people, organizations and events?

- Name(s)
- Birth and death dates
- Biographical data
- Occupations
- Tags
- Rights data
- Locations
- Bibliographic data or links
- Images



Presentation

Transcription

Searchable metadata

Archival collections

Relations between docs

Links to people, organizations
and events mentioned, etc.

Public interaction

Map-based views

JANE ADDAMS TO ROSIKA SCHWIMMER, AUGUST 22, 1916

TRANSCRIPT

IMAGE

CREATOR

ADDAMS, JANE

DATE

1916-08-22

DESCRIPTION

Addams discusses her involvement with Henry Ford's Peace Ship and tells Schwimmer that she cannot intercede for her with Ford.

SUBJECT

ADDAMS, JANE, REQUESTS TO
ADDAMS, JANE, VIEWS ON PEACE
ADDAMS, JANE, HEALTH OF

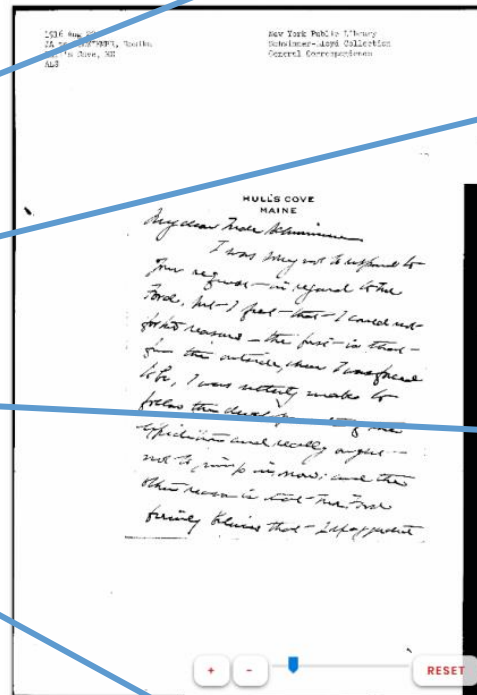
COLLECTION

SLC-WW - SCHWIMMER-LOYD COLLECTION

TAGS

HEALTH
PEACE
REQUESTS

MAP



MENTIONS (3)

RECEIVED BY (1)

WRITTEN BY (1)

COMMENTS (0)

REPLY TO (1)



ADDAMS, JANE (1860-1935)

[VIEW MORE RECORD DETAILS](#)

Presentation

Biographical Information

Relations to documents

Relations to organizations and events

Occupations

Maps (not shown)

SCHWIMMER, ROSIKA (1877-1948)

IMAGE



BIRTH DATE

1877-09-11

DEATH DATE

1948-08-03

BIRTHPLACE

BUDAPEST, HUNGARY

BIOGRAPHICAL TEXT

Rosika Schwimmer was a Hungarian pacifist and feminist who started work as a bookkeeper and labor activist. Schwimmer organized women workers in Budapest and then shifted her focus to women's rights when she founded the Hungarian Council of Women in 1904. Schwimmer engaged with the international suffrage movement, and supported efforts to secure birth control, abolish child labor and reform marriage. In 1914, she left Hungary to become the secretary of the International Woman Suffrage Alliance.

When World War I began, Schwimmer sought to convene a meeting of neutral nations to mediate a settlement, traveling the United States in an unsuccessful effort to gain sponsorship. Schwimmer toured the United States in 1914, lecturing on peace and suffrage, and joined with Jane Addams to form the Women's Peace Party. Schwimmer suggested the 1915 Hague Congress of Women, and led follow-up delegations to neutral countries. In 1915 she convinced Henry Ford to support the Ford Neutral Mediation Conference in Stockholm. The American delegation sailed for Europe on the much-touted 'Peace Ship,' but the mission ultimately failed. Schwimmer found it difficult to work with many of the delegates and she alienated both them and the American press.

She returned to the U.S. in 1916 to try to meet with Ford, but he refused to see her. Schwimmer was named Hungarian ambassador to Sweden in 1918, but after the Communist takeover of Hungary in 1920, she fled to Vienna, and then the United States. The American press had not forgotten her, and vilified her in the press. In 1928, Schwimmer was denied American citizenship because of her pacifist views. She fought the ban to the Supreme Court, but lost.

Schwimmer married Paul Bédy in 1911, but they divorced, childless, in 1913. She died, in New York, in 1948.

OCCUPATION

WOMAN SUFFRAGE ACTIVIST
PEACE ACTIVIST
LABOR ACTIVIST

RECEIVED BY (32) PARTICIPATED IN (2) MEMBER OF (3)
MEMBER OF (1) WRITTEN BY (53) MENTIONS (106)
COMMENTS (0) PARTICIPATED IN (1)



INTERNATIONAL COMMITTEE OF WOMEN FOR PERMANENT PEACE (ICWPP)



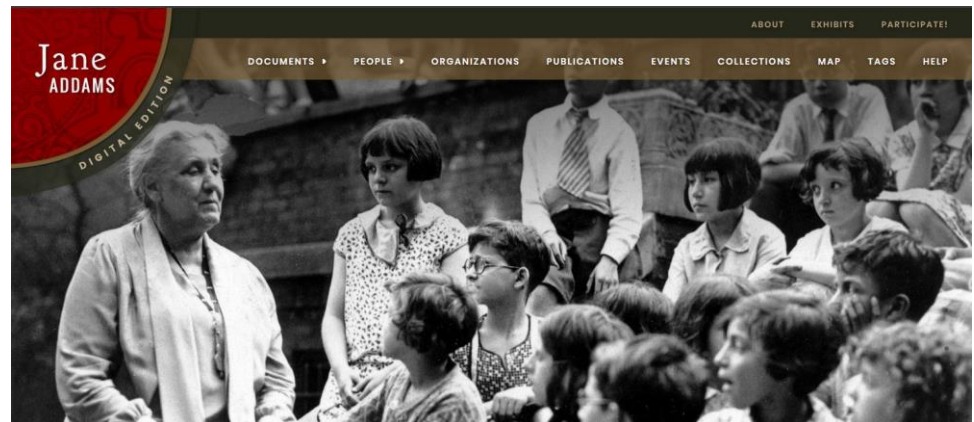
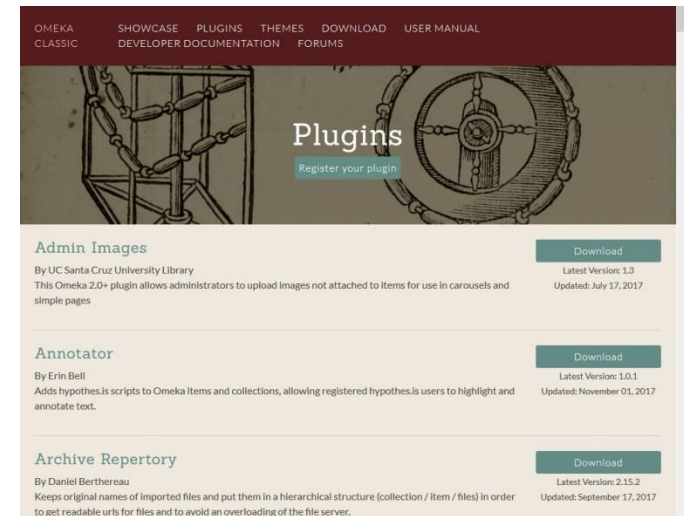
INTERNATIONAL COUNCIL OF WOMEN



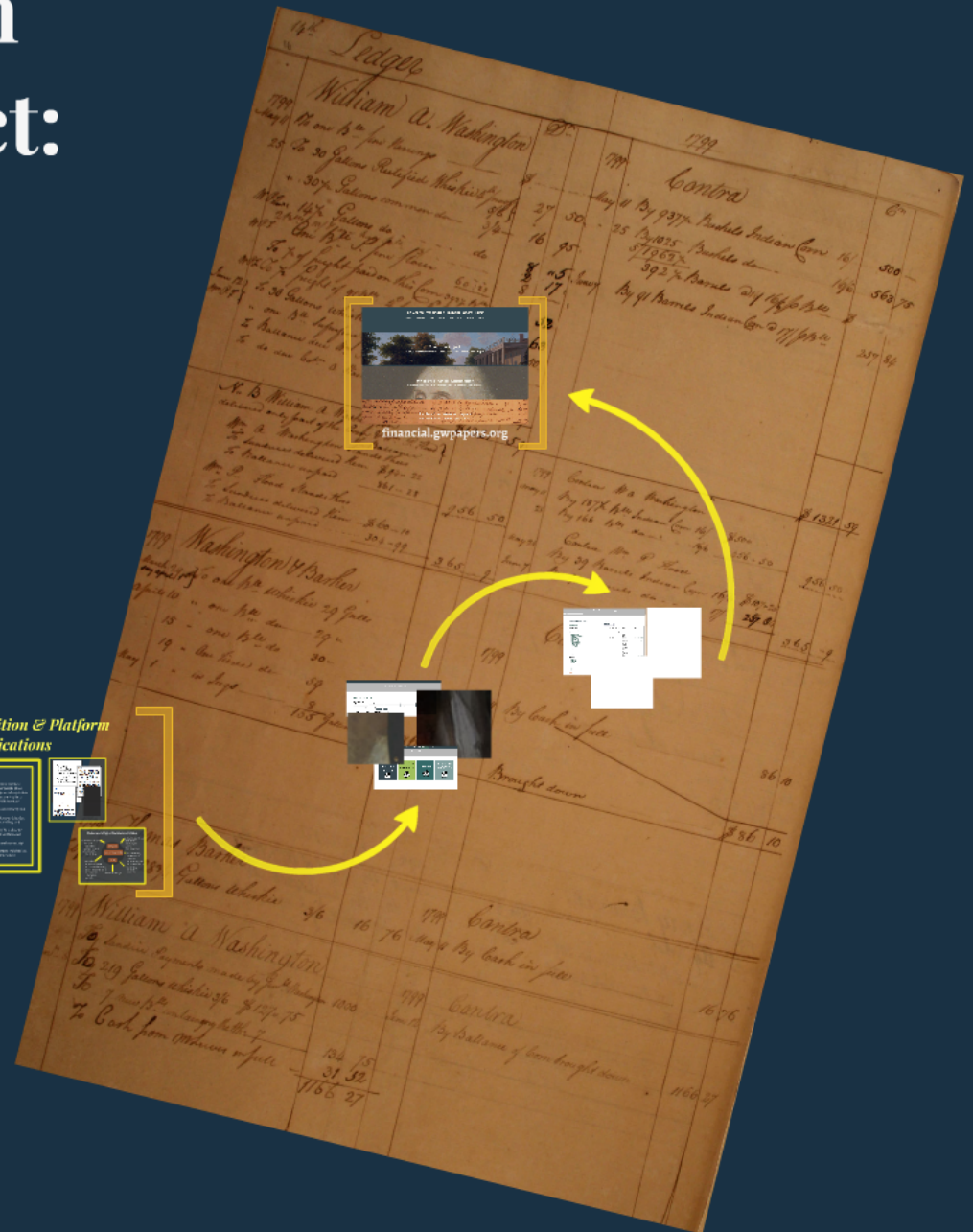
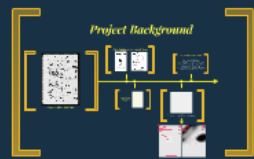
WOMAN'S PEACE PARTY

Finally....

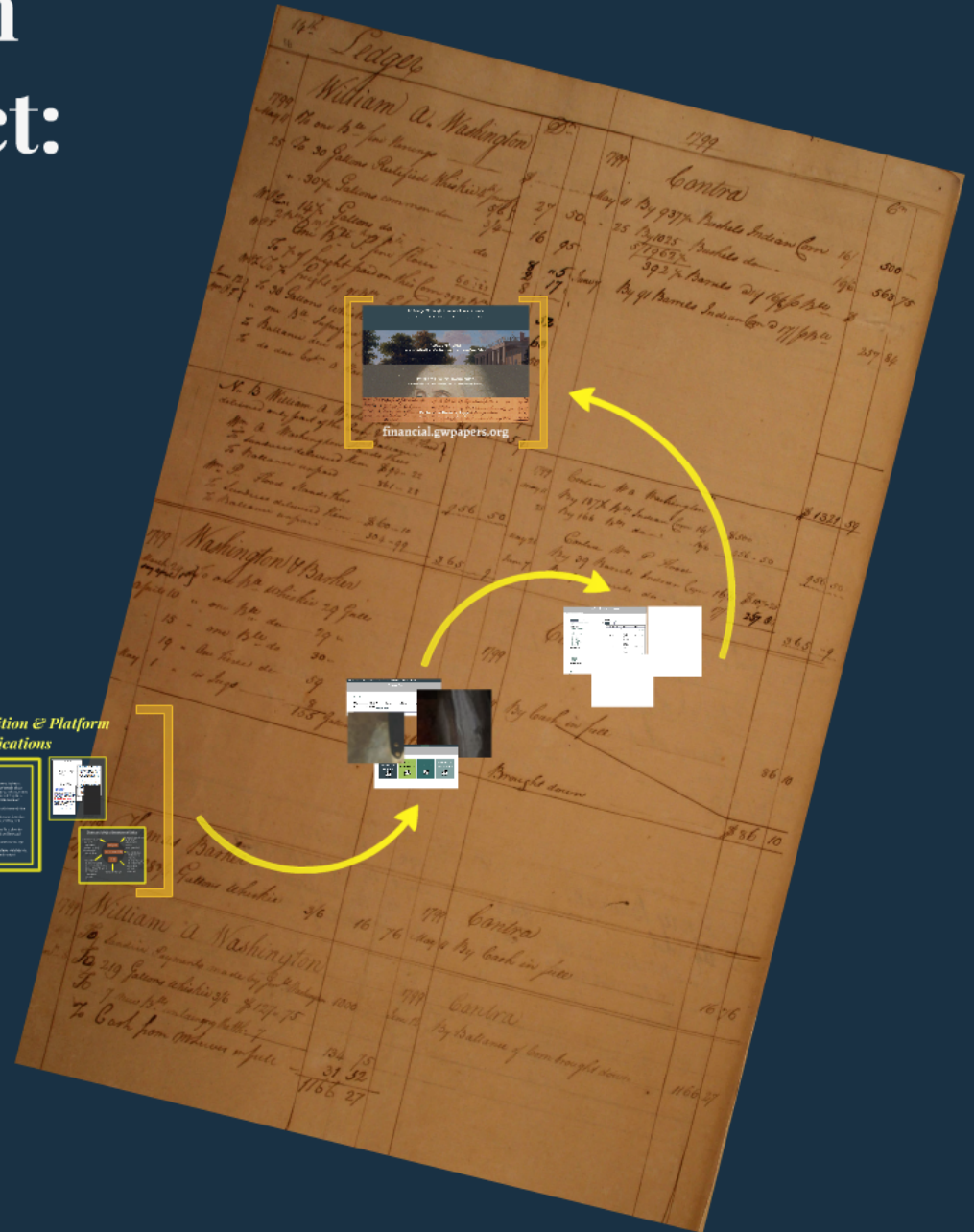
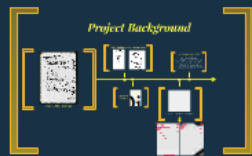
- You don't have to build it from scratch.
 - You choose the plugins you want to use.
 - Item Relations
 - Geolocation
 - Exhibit Builder
 - Develop your own
- You can publish using free themes
 - Develop your own
- You can add functions piece by piece
 - Exhibits
 - Crowdsourcing
 - Develop your own
- Robust community of users



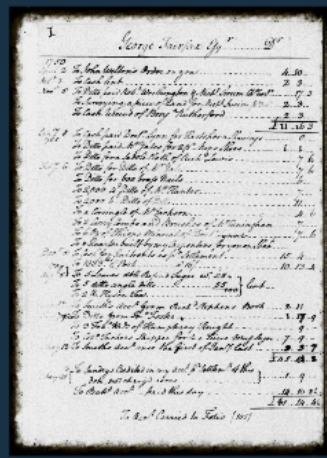
The George Washington Financial Papers Project: Edition and Platform



The George Washington Financial Papers Project: Edition and Platform

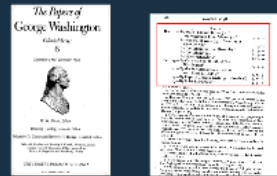


Project Background



Ledger A, Folio 1, Debit Side

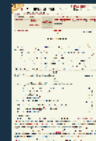
Early Publication in Colonial Series



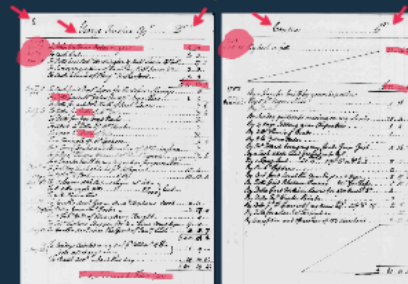
3-Year Grant from the NHPRC

- develop a freely accessible digital edition
- develop open source editorial platform
- transcription of 150 ledgers and 150 other documents from
 - search and advanced queries on the documents and data
- explore documents by people, places, dates, occupations or other services, food or beverages, signifiers, and place types
- structured search results, transcripts, and data
- follow links to related correspondence in the Papers of George Washington Digital Edition in both British and French Colonies

Digital Edition Publication



Ledger A - 356 folios - 846 pages



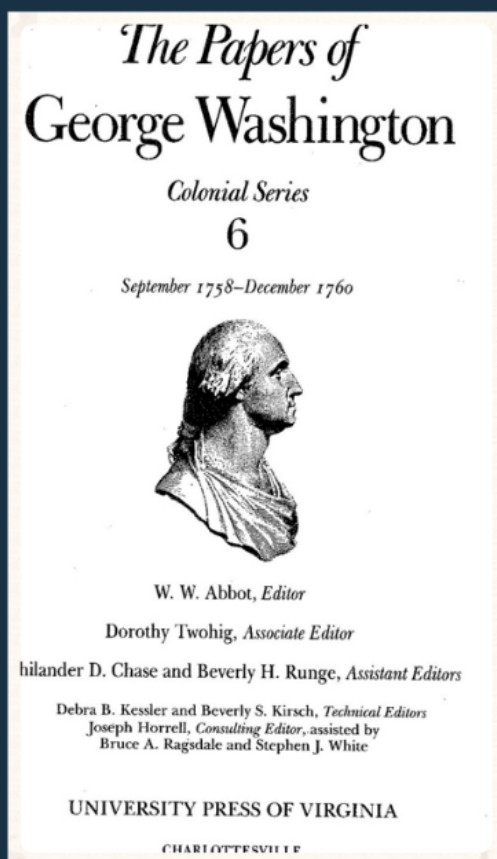
I

George Fairfax Esq^r Dr

1750			
April 2	To John Wellton's Order on you	4. 30	
Oct 7	To Cash lent	2 3	
Nov 8	To Ditto paid Rob ^t Worthington & Rich ^d Swinnell Cash	17 3	
	To Surveying a piece of Land for Rich ^d Swinnell p ^{ro} vid	2 3	
	To Cash received of Benj ^m Rutherford	2 3	
		<u>£ 11 16 3</u>	
Jan 7 5	To Cash paid Doct ^r Lynn for Hartschorn's Savings	0	
Feb 8	To Ditto paid M ^r Yates for 2 p ^{ts} hens & Hoes	1 5	
	To Ditto for a whole cloth of Rich ^d Lewis	7 6	
Feb 6	To Ditto for Ditto of M ^r Yates	7 6	
	To Ditto for 600 traps Nails	6	
	To 2000 lb Ditto of M ^r Hunter	7	
	To 2000 lb Ditto of Ditto	11	
	To a cording of M ^r Jackson	4 6	
	To 2 Lany Combs and Brushes of M ^r Tuningham	7	
	To 6 Dr of Ethiops Mineral of Doct ^r Lynne	7 6	
	To a Quarter built by my Carpenters for you on Sea		
Dec 8	To Cash for Laitrehts as p ^{ro} vided	15 4	
1751	To 1353 lb of Pork	10 13 4	
Aug 5	To 5 boxes dble refined Sugar w. 58		
	To 5 ditto single ditto	55 100	
	To 2 lb. Tyson's Tea		
Sept 17	To Smith's Acc ^t from Rich ^d Stephens Book	2 11	
Sept 17	To Ditto from M ^r Foster	1 57 9	
	To 3 Tob ^o Wds of Humphrey Knight	9	
	To 101 st Fuchers Skipper for 2 2 Three Map Sugar	7 9	
May 12	To Smith's Acc ^t since the first of Sept ^r last	3 3 7	
		<u>£ 45 12 2</u>	
May 20	To Sundrys Credited in my acc ^t p ^{ro} vided of this date, not charged above	1 9	
	To Bank Acc ^t - paid this day	14 10 8	
		<u>£ 61 14 4</u>	
	To Acc ^t Carried to Folio 105		

Ledger A, Folio 1, Debit Side

Early Publication in Colonial Series




182	December 1758
Contra	
Decr 10—By Ditto [Thomas Bishop] 21/.	
My Waggoner John Adams 40/. ²	3. 1. 0
By Expens. at Wests 7/5. Servants at	
Colo. Fx 7/6 ³	15. 11
By Jno. Alton for Tom Brownley ⁴	5. 4. 0
By Jno. Alton ⁵ 35/.	1. 15. 0
By Miles Richardson ⁶	1. 10. 0
Decr 19—By Cash paid my [brother] Chs	
Washington ⁷	13. 0. 0
22—By the Servants at Colo. Baylors	
1/3 Exps. at Tods 5/8	0. 6. 3
25—By Exps. at Chizzels Ordy ⁹ 5/.	0. 7. 6
Coach 2/6	
27—By Miles Richardson ¹⁰	2. 0. 0

AD, Ledger A, 52, 55.

1. For the source of this money paid to GW at Fort Loudoun by Charles Smith, see Smith to GW, 2 Dec. 1758.
2. Thomas Bishop (c.1705–1795) became GW's personal servant in the army in the fall of 1755. For Bishop's future service to GW, see George Mercer to GW, 17 Feb. 1760, n.5. In his account with his wagon driver John Adams, GW indicates that he paid the £2 to Adams at Bullskin plantation in Frederick County (Ledger A, 50).
3. GW arrived at Winchester on the night of 8 Dec. and was preparing to leave for Mount Vernon when he wrote Fauquier on 9 December. William West's ordinary was in Fairfax County at the junction of the Carolina and Colchester roads. The payment of 7s. 6d. to George William Fairfax's servants suggests that GW spent at least one night at Belvoir before leaving for Williamsburg on or before 18 December. The total should be 14s. 11d., not 15s. 11d.
4. Thomas Brownley (Bromley, Brumley), who died c.1778, owned land in Fairfax County.
5. In his account with his servant John Alton GW indicates that he paid £1.12.6 to Alton at Mount Vernon (Ledger A, 12).
6. For the identity of Miles Richardson, see Christopher Hardwick to GW, 12 Dec. 1758, n.1.
7. In his account with his youngest brother, GW notes that he "paid you [the £13] myself at Fredericksburg" on 20 Dec. (Ledger A, 13).
8. GW sometimes stayed at New Market, the house of Col. John Baylor (1705–1772) in Caroline County, on his way to Williamsburg. This was probably George Todd's ordinary down the road from New Market, also in Caroline County.

Digital Edition Publication


THE PAPERS OF GEORGE WASHINGTON
 Edward G. Lengel, Director

DIGITAL EDITION
 ROTUNDA

[ENTRY](#) • [ABOUT](#) • [SEARCH](#) • [PREFERENCES](#) • [LOG OUT](#) • [HELP](#)

PUBLICATION: Washington
 VIEW: Contents, Chronology, Index, Search Results

The Founding Era Collection > The Papers of George Washington Digital Edition > Colonial Series (7 July 1748-15 June 1775) > Volume 6 (4 September 1758-26 December 1760) > Documents > Cash Accounts
 December 1758

[printable version](#)

Go to page:

[181]

Cash Accounts

[December 1758]

What is known as **Ledger A (DLC;GW)** includes GW's personal accounts with individuals for the years 1750 to 1774. Interspersed in the ledger among the individual accounts are GW's cash accounts in which he recorded his cash intake ("Cash") and his cash expenditures ("Contra"). Except for letter-book copies of his letters to London merchants very little of what must have been an extensive correspondence between the time he left the Virginia Regiment in December 1758 and 1774 has survived. For this reason it seems useful to print month by month with some annotation the cash accounts for these years. GW followed the same form for his cash accounts, except in 1761 and 1762, with only minor variations. No attempt has been made to preserve variations in form such as placement of dates and the omission of zeros in the money amounts. Before this edition of GW's *Papers* is complete, his ledgers will be edited and printed in their entirety.

Cash		
Dece 9—	To Ditto [cash] of Lieutt Charles Smith	£28.16. 4 ¹
	[s8a]	
	Contra	
Dece 10	By Ditto [Thomas Bishop] 21/. My Waggoner John Adams	
—	40/. 2	3. 1. 0
	By Exps. at Wests 7/5. Servants at Colo. Fx 7/6 ³	15.11
	By Jno. Alton for Tom Brownley ⁴	5. 4. 0
	By Jno. Alton ⁵ 35/.	1.15. 0
	By Miles Richardson ⁶	1.10. 0
Dece 19	By Cash paid my [brother] Chs Washington ⁷	
—		13. 0. 0
22—	By the Servants at Colo. Baylors 1/3 Exps. at Tods 5/8	0. 6. 3
25—	By Exps. at Chizzels Ordy ⁸ 5/.	0. 7. 6
27—	By Miles Richardson ¹⁰	2. 0. 0

AD, Ledger A, 52, 55.

¹ For the source of this money paid to GW at Fort Loudoun by Charles Smith, see **Smith to GW, 2 Dec. 1758**.

² Thomas Bishop (c.1705-1795) became GW's personal servant in the army in the fall of 1755. For Bishop's future service to GW, see **George Mercer to GW, 17 Feb. 1760, n.5**. In his account with his wagon driver John Adams, GW indicates that he paid the £2 to Adams at Bullskin plantation in Frederick County (Ledger A, 50).

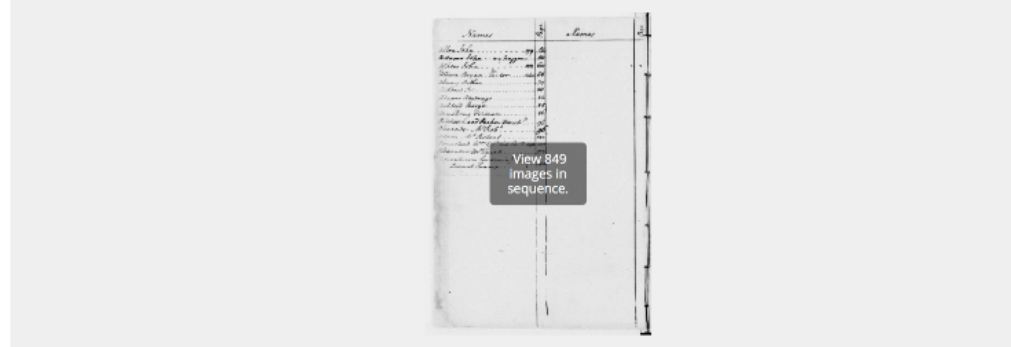
³ GW arrived at Winchester on the night of 8 Dec. and was preparing to leave for Mount Vernon when he wrote Fauquier on 9 December. William West's ordinary was in Loudoun County at the junction of the Carolina and Colchester roads. The payment of 7s. 6d. to George William Fairfax's servants suggests that GW spent at least one night at Belvoir before leaving for Williamsburg on or before 18 December. The total should be 14s. 11d., not 15s. 11d.

⁴ Thomas Brownley (Brunley, Brunley), who died c.1778, owned land in Fairfax County.

⁵ In his account with his servant John Alton GW indicates that he paid £1 13/6 to Alton at Mount Vernon (Ledger A, 12).

MANUSCRIPT/MIXED MATERIAL

George Washington Papers, Series 5, Financial Papers: General Ledger A, 1750-1772



Download: GIF (86.4 KB) [Go](#)

About this Item

Title

George Washington Papers, Series 5, Financial Papers: General Ledger A, 1750-1772

Contributor Names

Washington, George, 1732-1799 (Author)

Created / Published

1750/1772

Subject Headings

- United States
- Manuscripts

Genre

Manuscripts

Notes

- Formerly "Ledger Book 1"

Call Number/Physical Location

MSS 44693; Reel 115

series: Series 5, Financial Papers, 1750-1796

Part of...

George Washington Papers: Series 5, Financial Papers, 1750 to 1796 (34)
George Washington Papers (35,442)
Manuscript Division (142,877)

Format

Manuscript/Mixed Material

Contributors

Washington, George

Dates

1750 to 1772

Location

United States

Ledger A – 356 folios – 846 pages



I

George Fairfax Esq^r Dr

1750 April 2	To John Wellton's Order on you	4. 30
Oct 7	To Cash lent	2 3
Nov 10	To Ditto paid Rob ^t Worthington & Nich ^l Swaim M ^r Car ^r	17. 3
	To Surveying a piece of Land for Nich ^l Swaim p ^r Ord ^r	2. 3
	To Cash rec ^d of Ben ^y Rutherford	2. 3
		<u>211. 16. 3</u>
Jan 7 5	To Cash paid Doct ^r Lynn for Hartsborn's Savings	0.
Feb 5	To Ditto paid M ^r Yates for 2 p ^r Mens Shoes	1. 1
	To Ditto for a saddle cloth of Rich ^d Lewis	7. 6
Feb 6	To Ditto for Ditto of M ^r Yates	7. 6
	To Ditto for 600 brass Nails	6.
	To 2000 lb Ditto of M ^r Hunter	7.
	To 2000 lb Ditto of Ditto	11.
	To a Cossing of M ^r Jackson	4. 6
	To 2 Curry Combs and Brushes of M ^r Tunningham	7.
	To 6 Oz of Chiops Mineral of Doct ^r Lynn	7. 6
	To a Quarter built by my Carpenters for you on that	
Dec 10	To Cash for Quibrents as p ^r Settlement	15. 4
1751 Jan 5	To 1353. 1/2 of Pork	2 16. 1
Aug 5	To 5 Loaves abt. refined Sugar w ^o 58.	
	To 5 ditto single ditto	55. 100
	To 2 lb. Tyson Tea	
Sept 17	To Smith's Acc ^t from Rich ^d Stephens Book	2. 11
Sept 17	To Ditto from In ^o Foster	1. 57. 9
	To 3 Tob ^o Wds of Humphrey Knight	9.
	To Cor ^o Fuchers Shipper for 1/2 a Tunc Mus. Sugar	7. 9.
May 13	To Smith's Acc ^t since the first of Jan ^y last	3. 3. 7
		<u>45. 12. 8</u>
May 23	To Sundrys Credited in my acc ^t p ^r Settlement of this	
	date, not charg ^d above	1. 9.
	To Bank acc ^t - paid this day	14. 10. 8 1/2
		<u>61. 14. 4 1/2</u>

To Acc^t Carried to Folio 105

Contra Cr

1751 Sept 12	By Cash in full	11. 16. 3
1752 December 3	By a Quarter built by your Carpenters	
	By 8 p ^r Negroes Shoes	1. 16.
	By Butter	
	By Sundry quibrents arising on my Lands	15. 4.
	By 4 days Jobbing your Carpenters	1. 4.
	By 2 M ^r Flouring Brads	1.
	By 8 lb. Yellow Baker	
	By In ^o Coleride bringing my Goods from York	4. 16. 7 1/2
	By a Cash white Lead groing into Oyl	
	By 1 Topaz Seal	25. 10. 50 p ^r B ^o on 2 1/2 1/2
	By Rich ^d Stephens	2.
	By Cash paid Lovel the New England Man	8. 17. 6
	By Ditto paid Rhodam Tennan & Co ^o for Shells	5. 17. 12
	By Ditto paid William Lewis for 180 Bush ^l S ^o	4.
	By Ditto In ^o Winter Painter	3.
	By Ditto p ^r F. Speers call ^d my Arms 20 p ^r 50 p ^r 157	2. 5.
	By Ditto for a barr ^l of Serpentine	15.
	By Comp ^o tion and Office Fees of 183 Acres Land	2. 14. 1 1/2

61. 14. 4 1/2

3-Year Grant from the NHPRC

- develop a freely accessible digital edition
 - develop open-source editorial platform
- transcriptions of GW's ledgers and GM's 1811-1816 account book
 - simple and advanced searches on the documents and data
- explore documents by people, places, ships, occupations & titles, services, food & beverages, agriculture, and place types
 - download search results, transcription, and data
- follow links to related correspondence in the Papers of George Washington Digital Editions in both Rotunda and Founders Online

Overall Goals

- Population of content management database with Washington's three major ledger books of accounts.
- Preparation of Gouverneur Morris' 1811-1816 account book and its entry into the content management database.
- Completion of a freely accessible digital edition.
- Development of an open source editorial and publication platform for financial documents.

Content-Specific Goals

- Metadata
- Transcription and data
- Annotation, taxonomies,
glossary
- Internal Linking
- Indexing

Platform-Specific Goals

- Open-source
- Flexible editorial / publishing tools
- Ability to download data
- Powerful search and browse functions

Accessibility



```
graph TD; A[Accessibility] --> B[1. documents are available]; A --> C[2. content is intellectually accessible];
```

1. documents
are available

2. content is
intellectually
accessible

Developing Edition & Platform Specifications

Platform

- easy to use and customize
- extendable
- all-inclusive content management / publication platform
- manage workflow
- handle a variety of document types
- flexible, numerous, and robust "annotation" options
- ability to relate documents and information
- capture metadata
- clean, user-friendly interface
- other projects can implement

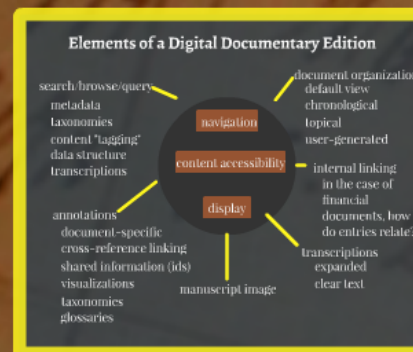
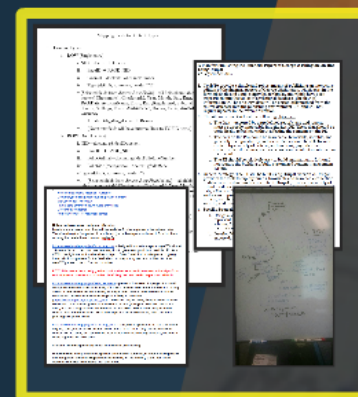
Platform Requirements

Content

- transcription + image + data
- transaction / page / document level metadata and annotations
- create taxonomies that correspond to the cumulative index
- link between financial documents and other PGW volumes
- construct ids, provide links to related documents and people
- build relationships based on place, occupation / title

Interface

- easy-to-use edition
- powerful search and browse features:
 - search: account name/people/place/date; ability to change search operators
 - browse: document, accounts/place/ships/occupation & title/services/commodities
 - keyword search on both transcription and data
 - sort searches by book page, date, day, month, year, pounds, shilling, and pence
 - fields using taxonomy lists allow for content to be related and browsed
- download data
- view both transcription and manuscript image
- variety of annotation options and displays, that can lead to additional content discovery



Specification

Platform Requirements

Platform

- easy to use and customize
- extendable
- all-inclusive content management / publication platform
- manage workflow
- handle a variety of document types
- flexible, numerous, and robust "annotation" options
- ability to relate documents and information
- capture metadata
- clean, user-friendly interface
- other projects can implement

Content

- transcription + image + data
- transaction / page / document level metadata and annotations
- create taxonomies that correspond to the cumulative index
- link between financial documents and other PGW volumes
- construct ids, provide links to related documents and people
- build relationships based on place, occupation/title

Interface

- easy-to-use edition
- powerful search and browse features:
 - search: account name/people/place/date; ability to change search operators
 - browse: document, accounts/place/ships/occupation & title/services/commodities
 - keyword search on both transcription and data
 - sort searches by book page, date, day, month, year, pounds, shilling, and pence
 - fields using taxonomy lists allow for content to be related and browsed
- download data
- view both transcription and manuscript image
- variety of annotation options and displays, that can lead to additional content discovery

Mapping Fields to Content Types

1. Content Types

a. ROW (Single entry)

- i. NID—doctext::IDdoctext
- ii. PageID → PAGE_NID
- iii. Ordinal—doctext::FolioLineNumber
- iv. Type (default, summary, header)???
- v. [Selected fields from *Source Row Fields*]—(all fields from table doctext) Checkmark1, Checkmark2, Year, Month, Day, **Date**, **DrCrData**, AccountName, Entry, **EntryRegularized**, Subtotal, Pounds, Shillings, Pence, **AmtAsPence**, Dollars, Cents, **AmtAsDollars**, **Currency**

1. also, **ids_after_doctext::IDName**

vi. [Note: text fields will have internal links to TOPIC items.]

b. ROW (Double entry)

- i. NID—doctext_gSide::IDdoctext
- ii. PageID → PAGE_NID
- iii. FolioOrdinal—doctext_gSide::FolioLineNumber
- iv. FolioSide (recto, verso)—doctext_gSide::Side
- v. Type (default, summary, header)???
- vi. [Selected fields from *Source Row Fields* below]—(all fields from table doctext_gSide) Checkmark1, Checkmark2, Year, Month, Day, **Date**, **DrCrData**, AccountName, Entry, **EntryRegularized**, Subtotal, Pounds, Shillings, Pence, **AmtAsPence**, Dollars, Cents, **AmtAsDollars**, **Currency**

[Notes on taxonomy modules - October](#)
[Content type editing pages running out of memory](#)
[WSOD on edit-lines view](#)
[Partial date errors on new double-entry lines](#)
[Core/module updates](#)
[Authority control for historical names](#)

Notes on taxonomy modules - October

I've done some research on the modules available for sharing taxonomies between sites. There's nothing that's a perfect fit, and I can't (yet, at least) personally vouch for all of them working, but here's the options and trade-offs:

https://www.drupal.org/project/taxonomy_csv = designed for one-time sync using CSV; almost 15k users. Should check and see how easy it is to generate a publicly-accessible URL for a CSV in the right format, for other sites to import. Doesn't work for importing on an ongoing basis, which is a problem for the GWP sites, but may or may not be a problem for other non-GW papers projects. Drupal-compatible.

PQW: This seems like a really good option for when we extend the current editorial platform so that projects can share taxonomies. I definitely think we need to experiment with this.

https://www.drupal.org/project/web_taxonomy = provides a framework for plugins for specific web-published taxonomies, in a variety of formats. Queries the external source for taxonomy autocomplete, and copies terms locally as they're used. Seems to be the basis for some DH-oriented development, such as plugins for Getty vocabularies (https://www.drupal.org/project/web_getty). Downside: only 20 users; Getty only has 11 users. Would also require development of at least one module (a plugin to work with the source data), and the configuration of the Services module to expose the vocabulary as a web service. Also: unclear whether this module supports "child" sites adding their own terms (would guess probably no).

https://www.drupal.org/project/taxonomy_sync = designed to sync terms across sites on an ongoing basis, doesn't allow different terms on the "child" sites. Only available as a dev version with 10 users, last updated this year. Other than sustainability concerns, could be a viable approach for GWP sites.

Of these, I can only personally vouch for *taxonomy_csv* working.

I'd recommend testing *taxonomy_sync* for GWP-internal purposes. In order to make possible an arrangement of maintaining taxonomies centrally for the project (i.e. you don't want individual sub-sites to be adding their own terms).

A Plan for Publishing the Financial Papers of George Washington On-line Using Drupal

27 September 2014

1. Goal: To provide a simple and robust means of publishing an interactive edition of the financial papers of George Washington, which exist in the form of single and double entry ledger books, and which have been transcribed into the tables of a relational database. The flow of information will be one way: data will be periodically pushed from the source database into the publishing environment (PE) and will not require updates in the reverse direction.

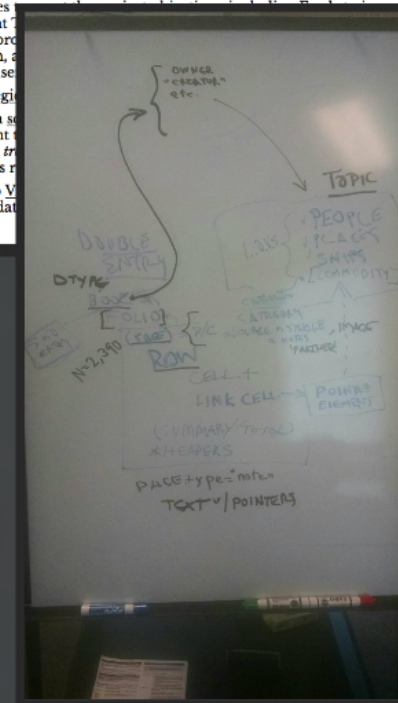
2. The site must meet at least the following objectives:

- a. The data -- exported by a predefined set of views and reports -- must be directly importable into the host PE. These data should be periodically refreshed without affecting the contents on the PE.
- b. The data on the PE should be searchable, browsable, sortable, and generally manipulable by end users. Users should be able to view content by a variety of criteria, such as book, page, date, and content-related features, such as persons and content mentioned in the record.
- c. The PE should be relatively easy to build and maintain. It should not require the building of fully customized content management system.

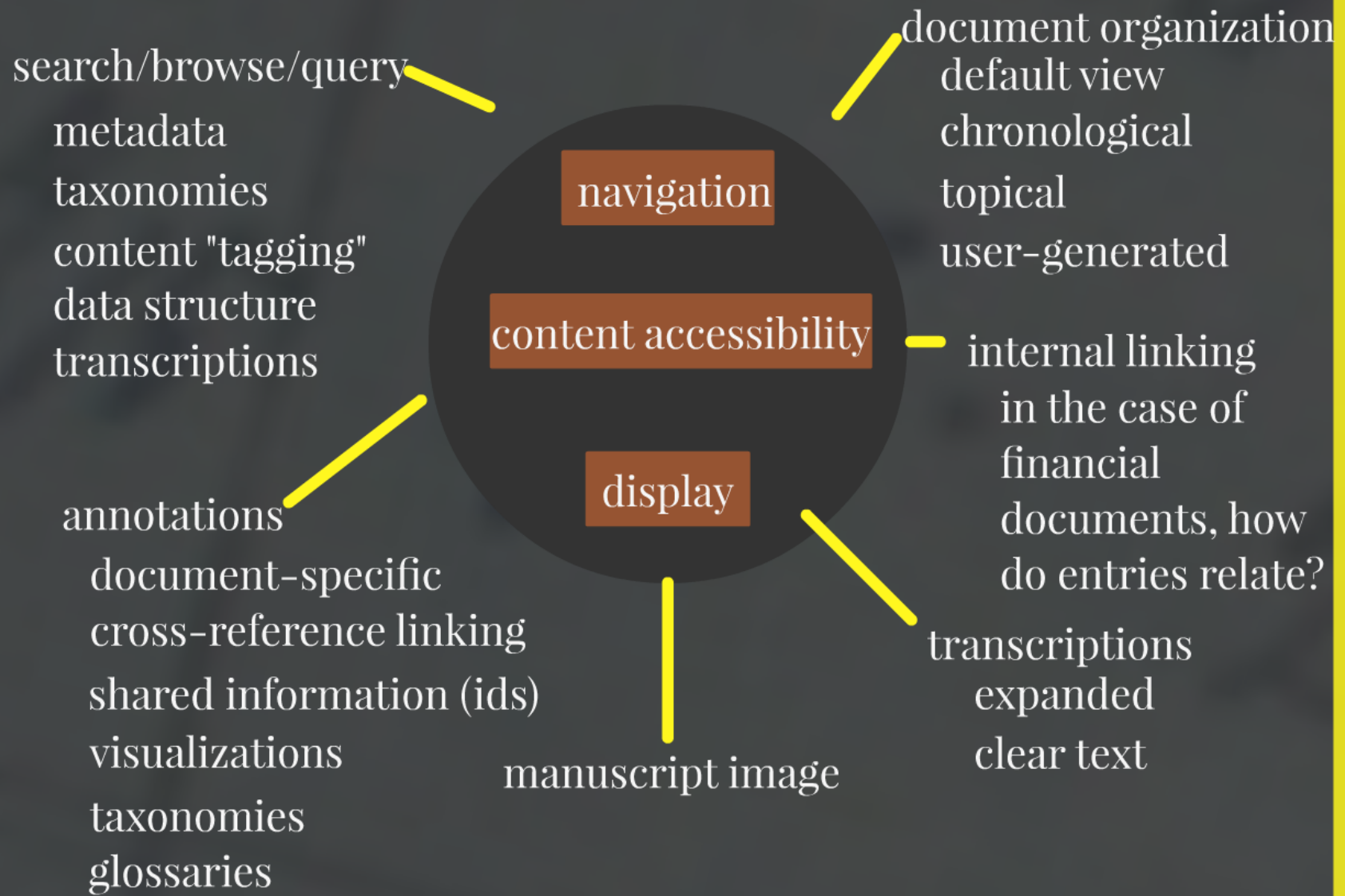
3. General Strategy: The PE will be built using Drupal (version 7). Drupal provides the tools to rapidly build a browsable and searchable collection of data construed as bundles of content. Drupal provides a variety of extant modules for content management, including a Content Management System (CMS), a Content Management Interface (CMI), and Views to provide browse, search, and security and user management.

4. Specific Strategies:

- a. Design a schema to represent the data, and use it to generate the row's metadata.
- b. Develop Views to expose data to the user interface.



Elements of a Digital Documentary Edition



Advanced Search

Glossary of Terms and Abbreviations

Displaying 1 - 50 of 29270

Book
Account Name
Day
Month

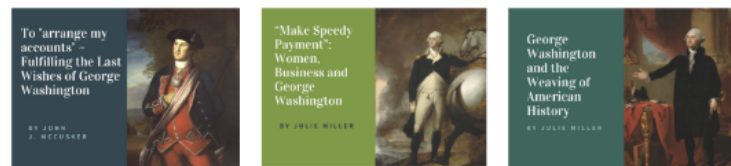
Entry
Entry Regularized

Book page
Date
Account Name
Entry

Learning Center

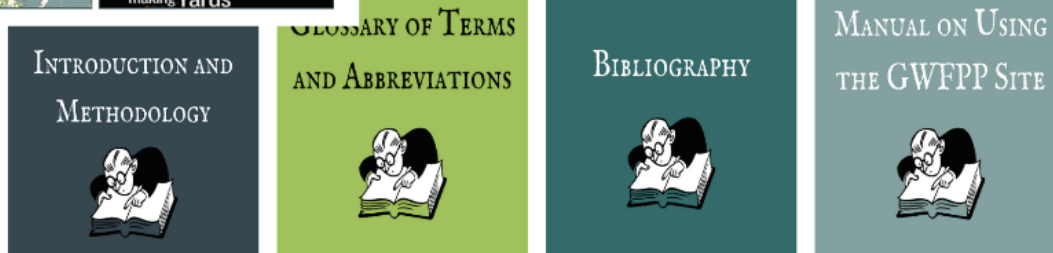
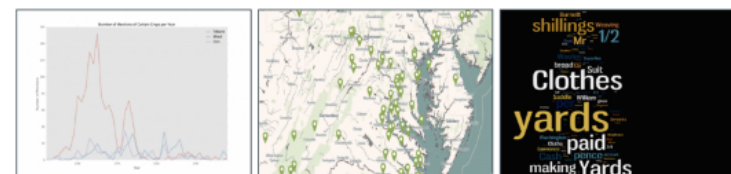
Articles & Blog Posts

[Read more](#)



Visualizations

[View more](#)



Explore

Book page	Book	Account Name	Date	Entry	Regularized
1	1	1	1	1	1
2	2	2	2	2	2
3	3	3	3	3	3
4	4	4	4	4	4
5	5	5	5	5	5
6	6	6	6	6	6
7	7	7	7	7	7
8	8	8	8	8	8
9	9	9	9	9	9
10	10	10	10	10	10
11	11	11	11	11	11
12	12	12	12	12	12
13	13	13	13	13	13
14	14	14	14	14	14
15	15	15	15	15	15
16	16	16	16	16	16
17	17	17	17	17	17
18	18	18	18	18	18
19	19	19	19	19	19
20	20	20	20	20	20
21	21	21	21	21	21
22	22	22	22	22	22
23	23	23	23	23	23
24	24	24	24	24	24
25	25	25	25	25	25
26	26	26	26	26	26
27	27	27	27	27	27
28	28	28	28	28	28
29	29	29	29	29	29
30	30	30	30	30	30
31	31	31	31	31	31
32	32	32	32	32	32
33	33	33	33	33	33
34	34	34	34	34	34
35	35	35	35	35	35
36	36	36	36	36	36
37	37	37	37	37	37
38	38	38	38	38	38
39	39	39	39	39	39
40	40	40	40	40	40
41	41	41	41	41	41
42	42	42	42	42	42
43	43	43	43	43	43
44	44	44	44	44	44
45	45	45	45	45	45
46	46	46	46	46	46
47	47	47	47	47	47
48	48	48	48	48	48
49	49	49	49	49	49
50	50	50	50	50	50

Ships

Occupations & Titles

Services

View Edit Manage display Devel

Page Overview	Image 1	Image 2
----------------------	----------------	----------------

Glossary of Terms and Abbreviations

£sd Calculator

Account Name:

- Fairfax, George William

People:

- Collierle, John
- Fairfax, George William
- Foster, John
- Lewis, Richard
- Lewis, William
- Lynn, William
- Stephens, Richard
- Tucker, Robert, Jr
- Welton, John
- Winter, John

Occupation/ Title:

- Slave
- Carpenter
- Painter
- Colonel

Services:

- Surveying
- Carpentry
- Freight

Food and Beverage:

- Pork
- Tea
- Butter
- Sugar

edit

XML

Next Page:
Ledger A, 1750 - 1772: pg.2

Debit	Credit
-------	--------

	Year	Month	Day	Account Name	Entry	£	s	d		
1				George Fairfax Esqr. Dr					edit	delete
2	1750	April	2		To John Welton's Order on you	4	10		edit	delete
3		Octr	7		To Cash lent	2	3		edit	delete
4		Novr	8		To Ditto paid Robt Worthington & Michl Swcim Chr Govr	17	3		edit	delete
					To Surveying a piece of Land for					

Edit Double-entry line Ledger A, 1750 - 1772: pg.1, L 4

Edit Double-entry line Ledger A, 1750 - 1772: pg.1, L 4 VIEW EDIT MANAGE DISPLAY DEV

General

Transcription

Data *

Menu settings
Not in menu

URL path settings
Alias: content/odger-1750-1772-pg1-1-4

XML sitemap
Include: Default (excludes)
Priority: Default (0.5)

Revision information
No revision

Comment settings
Closed

Authoring information
By admin on 2015-08-21 19:47:41
-0750

Publishing options
Published

Year

The year, as displayed in the line transcription.

Month

Nov

The month, as displayed in the line transcription.

Day

8

The day, as displayed in the line transcription.

Account Name (transcription)

Text format Filtered HTML

More information about text formats

- Web page addresses and e-mail addresses turn into links automatically.
- Allowed HTML tags: <a> <blockquote> <code> <div> <div> <div> <div> <div> <div> <div> <div> <div> <div> <div>
- Lines and paragraphs break automatically.

The account name, as displayed in the line transcription.

Entry

To Dillo paid Hobt Worthington & Mison Swelm Chr Govv

Text format Plain text

More information about text formats

- No HTML tags allowed.
- Web page addresses and e-mail addresses turn into links automatically.
- Lines and paragraphs break automatically.

Subtotal

Text format Filtered HTML

More information about text formats

- Web page addresses and e-mail addresses turn into links automatically.
- Allowed HTML tags: <a> <blockquote> <code> <div> <div> <div> <div> <div> <div> <div> <div> <div> <div>
- Lines and paragraphs break automatically.

Page

[Home](#) » [Ledger A, 1750 - 1772: pg.1](#)

Edit Book page Ledger A, 1750 - 1772: pg.1 o

General
Images
Data
Annotation
Workflow
Menu settings Not in menu
URL path settings Alias: content/ledger-1750-1772-pg1
XML sitemap Inclusion: Default (included) Priority: Default (0.5)
Meta tags Using defaults
Revision information No revision
Comment settings Closed
Authoring information By admin on 2015-08-21 10:17:26 -0700
Publishing options Published

Account Name (data)

Fairfax, George William ✕

People

Fairfax, George William ✕

Foster, John ✕

Lewis, Richard ✕

Stephens, Richard ✕

Winter, John ✕

Tucker, Robert, Jr ✕

Lewis, William ✕

Welton, John ✕

Lynn, William ✕

Collerile, John ✕

Place

Select options

Ships

Select options

Occupation/ Title

-Slave ✕

-Carpenter ✕

-Painter ✕

-Colonel ✕

Services

-Surveying ✕

-Carpentry ✕

-Freight ✕

Food and Beverage

-Pork ✕

-Tea ✕

-Butter ✕

-Sugar ✕

The George Washington Financial Papers Project

About Documents Search Explore Learning Center Resources Contact

About the Project

An overview of the history of the George Washington Financial Papers Project.

What are Financial Documents?

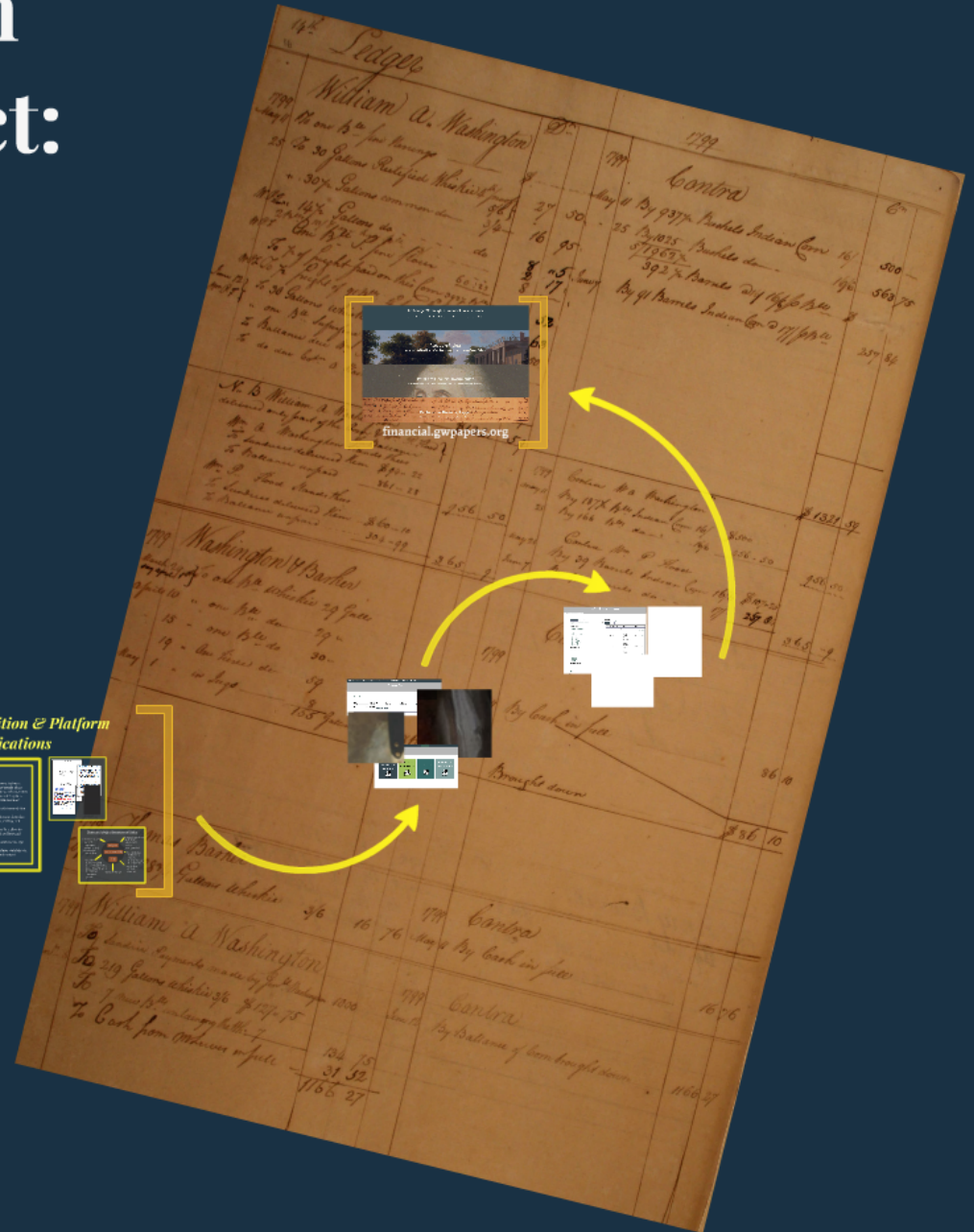
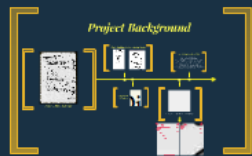
An explanation of George Washington's business and household accounts.

Explore the Financial Papers

Learn how to use the search and explore features.

financial.gwpapers.org

The George Washington Financial Papers Project: Edition and Platform



The Center for Digital Editing and Jane Addams Papers Project received a Digital Humanities Advancement grant from the National Endowment for the Humanities to plan and host a workshop to discuss the development of digital documentary editing platforms. This workshop brought together editors and technical experts currently engaged with/interested in two open-source content management systems—Omeka and Drupal—to discuss the use, development, and distribution of options for creating and publishing digital documentary editions.

To continue this work, and to get a better sense of the state of the digital edition in 2018, we ask for information about your plans for digital publication. Are you planning a digital edition, and if so, what technology are you using? Are you content with your choice, or do you think you might migrate your edition to a new platform in the future? We hope to use the results of the survey to help us plan the development of tools, organize workshops and training, and think about whether there is a need for broader digital standards. Thanks for your participation!



Untitled Section

Description (optional)

Which project are you filling out the survey for?

Short answer text

What best describes your digital edition work and/or plans?

- ☐ Currently publishing
- ☐ Working on but not published yet
- ☐ Planning stages
- ☐ No plans to create a digital edition
- ☐ Digital edition created but no longer functions/available

What is your current platform/tool for publication?

- ☐ HTML
- ☐ WordPress
- ☐ Drupal 7
- ☐ Drupal 8
- ☐ Omeka
- ☐ Omeka-S
- ☐ Scalar
- ☐ Islandora
- ☐ XML
- ☐ TEI-XML
- ☐ PubMan
- ☐ DocTracker
- ☐ Mukurtu
- ☐ Other...

What platform/tool features do you like? What features are missing or could be improved?

Long answer text

If you have not yet selected platforms/tools for your project, which ones are you interested in?

☐ HTML

☐ WordPress

☐ Drupal 7

☐ Drupal 8

☐ Omeka

☐ Omeka-S

☐ Scalar

☐ Islandora

☐ XML

☐ TEI-XML

☐ PubMan

☐ DocTracker

☐ Mukurtu

☐ Other...

What features are you looking for in a digital edition publication platform (editorial tools, content display, workflow tools, annotation options, etc.)?

Long answer text

Who currently provides the digital expertise for your online publications? (check all that apply)

- ☐ Project Staff
- ☐ Institutional Support
- ☐ Consultants
- ☐ Students
- ☐ None

How involved is your host institution on your digital publication efforts?

- ☐ Full/extensive support (1 FTE)
- ☐ Partial support (central systems available and supported)
- ☐ Minimal support (help desk)
- ☐ No support

What kinds of tools, workshops, or instructional materials would help you most to publish the digital edition you want?

Long answer text

Are you interested in learning more about the outcomes from this grant or next steps? Have additional questions or comments? Please let us know (and provide your contact info) and we will be in touch. Thanks!

Short answer text
